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AUTHOR Malcolm, Heather; Byrne, Michel
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ABSTRACT

The 5-14 Development Programme is a major reform encompassing the whole of the curriculum, assessment, national testing and reporting for pupils 5- to 14 years of age in Scotland. To monitor the early years of implementation of the program, the Scottish Office Education and Industry Department (SOEID) commissioned a national evaluation with a number of strands. This evaluation ran between March 1991 and March 1995. Coordination was handled from the Scottish Council for Research in Education (SCRE) which also undertook one of the strands' implementation in the primary school. This report is divided into six sections. The first section is an introduction that addresses research aims and methods, and the organization of the report. The second section covers the impact of 5-14 on curriculum practice, and the third covers assessment and national testing. The fourth section examines liaisons with secondary and pre-five sectors, and the fifth addresses management of 5-14. The last section provides an account of implementation of 5-14 in one particular school. (WJC)

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5–14 in the Primary School
The First Four Years

Heather Malcolm
Michel Byrne

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5–14 in the Primary School
The First Four Years

Heather Malcolm
Michel Byrne

SCRE
The Scottish Council for
Research in Education

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Summary of main research findings

The Impact on curriculum practice

By 1994 teachers seemed more at ease with the guidelines in language and mathematics than in the earlier years of the evaluation. Little progress had been made in the areas of religious and moral education, the expressive arts, or environmental studies, but reactions to the new environmental studies guidelines from those who had read them were on the whole positive. Having initially served to audit school practice, the documents seemed to be of most use to teachers in forward planning. Head teachers thought they were useful to ensure consistency of direction among staff and to help with staff development and differentiation.

Main changes in schools were in curriculum content. Changes in methodology were not so readily identified, and there was some discrepancy between head teachers' and teachers' expectations in this area. Head teachers did not feel 5–14 had led to changes in the specialist help available, although there was some evidence of specialists in the expressive arts functioning as carriers of innovation. Some staff predicted changes in the teaching approaches needed for environmental studies, and in the organisation and planning of topics across the school: broad term-long themes would give way to more focused topics clearly structured to ensure balance, progression and continuity. More material and staffing resources would be needed to cover adequately the broad range of environmental studies components.

Perceptions of the impact on children of the changes occurring in the classroom were mixed, but around half those interviewed believed that their pupils were benefiting from a broader range of learning experiences, from the new emphases on oral and problem-solving skills, and from a more consistent, continuous learning experience.

Assessment and national testing

Schools were slow to begin taking account of the assessment guidelines, although staff generally thought them helpful and appreciated their stress on the centrality of assessment to teaching and learning as well as the opportunity they offered for reflection on assessment. On the other hand, the guidelines were felt to overemphasise written records, and to need examples. Teachers were growing more comfortable with the 5–14 levels in mathematics and English language, although some head teachers wondered if teachers' confidence with the levels might be less than it seemed.

Not all the sample schools had given national tests in 1993, so experience of the new arrangements was limited. Most people, however, were satisfied with these arrangements because they gave teachers more control over the timing and organisation of the tests. Organisation, however, was feared to be difficult and time-consuming. Many people failed to see value in the tests as they were thought to do no more than confirm teachers' judgements, to encourage 'teaching to the test' and to 'label' children, and some teachers felt the test materials did not assess children's knowledge adequately. There was little evidence that negotiation with parents or pupils had taken place or was planned.

Liaison

Primary schools were involved in a variety of largely successful liaison strategies, especially pupil visits to high schools and discussions with guidance and subject teachers. Opinion about the success of cluster groups was mixed, largely because of the disparate backgrounds of member schools. Successful groups shared 5–14 development work, thus maintaining its coherence, helping staff appreciate each other's skills and reducing isolation. A major benefit was that direct contact with secondary school departments and subject teachers had been established, leading to joint schemes of work and specialist help; but on the other hand, many secondary schools were seen as reluctant to liaise, and ill-informed about 5-14. Time to meet and give feedback was always a problem. The broad picture, however, is of primary school staff satisfaction with secondary school links, though contact needed to be more curriculum-oriented and more consultation about the pace and priorities in 5–14 was required.

Just under half the head teachers thought 5–14 had brought changes to their liaison with nursery schools. A main benefit was increased awareness of the continuity between nursery, primary and secondary, which sometimes led to improved written reports from nurseries and forms of link work for pupils. P1 teachers also thought that well-planned liaison made transition from nursery school easier for children. Obstacles included the variety of working methods used in different nurseries, a perception that the written information nurseries provided could not be relied upon and practical concerns such as the difficulty of finding cover for P1 teachers to visit nurseries.

Managing 5–14

Most head teachers used their cluster groups as useful vehicles for implementing change, but many felt that individual school circumstances, priorities and paces of implementation limited the effectiveness of collaboration. More store was set by school development plans which gave foci for development through specified targets agreed with staff, which gave them ownership over the changes being sought. However, such plans did not protect schools from outside pressure as much as some head teachers had hoped. Staff structures had not changed significantly to take account of 5-14, although head teachers stressed the importance of supportive staff and consensual leadership.

Support from Regional authorities varied in type and usefulness. Further help needed included financial resources, extra staffing, more written materials and further training.

There was a relatively high degree of satisfaction among both head teachers and their staff with the way change had been managed in schools. Reasons included a slower pace of development, increased familiarity with the guidelines, and beneficial in-house discussion and developmental work.

1 Introduction

Between 1991 and 1995 the Scottish Office Education Department, now Scottish Office Education and Industry Department (SOEID), funded a national evaluation of the implementation of the 5–14 Development Programme. Initially the evaluation was made up of four separate projects, each the responsibility of a different institution:

- implementation of the 5–14 Curriculum and Assessment Guidelines in primary schools
- implementation of the Curriculum and Assessment Guidelines in secondary schools
- implementation of the guidelines on Reporting
- test material and its use.

The Scottish Council for Research in Education (SCRE) had responsibility for the first of these projects. This report, prepared by SCRE, is therefore based on data gathered in primary schools about the way that 5–14 curriculum and assessment were being implemented. It should be read in conjunction with the Executive Summary of the entire evaluation, which gives a careful account of the research methods used and pulls together the main threads from all the projects. Those who are interested in detailed findings from the different projects should read the separate reports (listed in Harlen, SCRE, 1996).

To make the context in which implementation takes place clear and to illustrate changes over time, the report summarises information which is already publicly available in two Interchanges: No 23, *Implementing 5–14: a Progress Report* (SOEID 1994), and No 36, *Implementing 5–14 in Primary Schools* (SOEID 1995). The current report has given greater attention to previously unpublished findings.

The SOEID has funded two further years of evaluation for the project, so work is ongoing until 1997, after which information about further progress in 5–14 will be available.

Research aims and method

The Executive Summary lists in full the research questions addressed by the overall evaluation, which aimed to provide information about all aspects of the 5–14 Development Programme in action, so that this could be used to improve the guidelines, the support materials and training procedures accompanying them. Major research areas addressed by the primary curriculum and assessment project included:

- Views of the curriculum and assessment guidelines, support materials and training provided in relation to each area of the curriculum
- Use of the curriculum and assessment guidelines and support materials, both at school and individual level

- Liaison both within school and across schools
- Staff participation in, and reactions to, staff development both in and outwith school
- The impact of the 5-14 Development Programme on teachers and pupils.

The project gathered information by questionnaire and interview. Late each autumn questionnaires were sent to headteachers and a selection of classroom teachers in a national sample of about 200 randomly selected primary schools. To supplement and enrich the information collected in this way, each spring researchers also visited, for about a week in each case, 25 primary schools chosen from the larger sample. These schools were chosen to take account of urban and rural, large and small, denominational and non-denominational, private and special schools, and were located in nine of Scotland's Regions, which at that time numbered 15. During the visit weeks, interviews with headteachers and teachers were conducted and in many cases researchers were given access to school documents and meetings about 5–14.

Organisation of the report

In addition to this Introduction, the report has six sections. *Section 2, The Impact of 5-14 on Curriculum Practice*, begins by giving an overview teachers' initial attitudes to the curriculum guidelines. It then moves to describe how teachers put those guidelines to use, and what changes resulted in classrooms.

Section 3, Assessment and National Testing, opens by looking at the extent to which schools had implemented the 5–14 guidelines for assessment. The section then examines the part played by school assessment policies in implementing 5-14, following this with information on teachers' reactions to the guidelines, their use and resulting changes in practice. Data on the extent to which teachers feel confident in their use of 5-14 levels and have the same understanding of them as other teachers are also covered.

Section 4, A Primary View of Liaison, describes the strategies for liaison with the secondary schools in which primary schools were engaged, and shows how effective schools considered these strategies to be. It continues with an account of the effect that 5-14 was considered, from the primary school perspective, to be having on liaison between primary and secondary schools, and ends with a brief discussion of the influence of 5–14 on links between primary and nursery schools.

Section 5, Managing 5-14, starts by considering the early stances taken by headteachers to the 5-14 Development Programme before moving to examine some of the strategies used to advance implementation: the use of 5-14 liaison groups, school development planning and school policies. The section then outlines the kinds of support schools received in implementing 5-14, summarising staff reactions, and ends by looking at headteachers' own assessment of their management of 5-14.

The final section, *Section 6, Glenmount*, tells the story of one school's implementation of 5-14. It is not intended to be a typical example of implementation, but has been included in the report to give some flavour of what implementing 5-14 can be like in practice. Many schools will have reacted differently to the 5–14 Development Programme; 'Glenmount' (a fictional name) simply describes the reactions, success and problems in one.

2 The Impact on Curriculum Practice

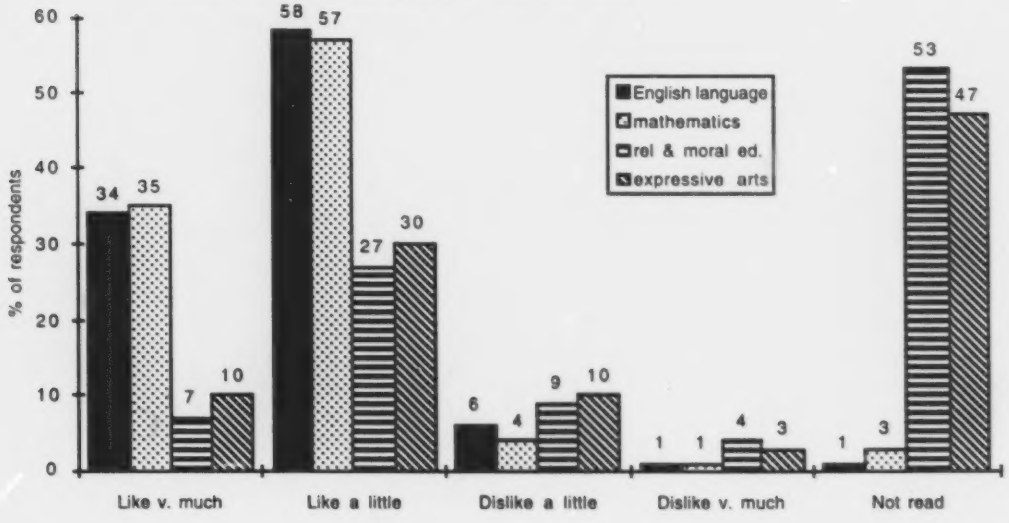
■ Teachers' reactions to the curriculum guidelines

The earliest opportunity in the project to ask teachers for their opinions about the curriculum guidelines came through the interviews of spring 1992. At that time, although working papers for other curriculum areas were available, only the guidelines for mathematics and English language had taken their final form, and because of this, most comment focused on mathematics and English.

The interviews indicated that most people had no strong feelings about any of the curriculum guidelines but tended to like rather than dislike them. At the same time as criticising the guidelines for wordiness and for lacking practical examples, teachers tended to praise them for clear and sensible content, especially the increased emphasis on talking and listening in English and on information handling in mathematics; the familiarity of many of the recommendations, which reassured teachers about their own practice, and because they provided a structure to which teachers could work.

This tendency to approve the guidelines was confirmed in the national survey of late autumn, 1992, when the view that the documents were on the whole sensible and helpful was tested and upheld. By this time, guidelines for the expressive arts and religious and moral education had reached schools, so it was possible for the questionnaire to take account of opinions about these as well as about the guidelines for mathematics and English language. Using information from this survey, Figure 2.1 below shows teachers' reactions to the guidelines at that time. (No data are shown for environmental studies as these guidelines were not published until 1993.)

Figure 2.1: Teachers' early reactions to the curriculum guidelines
(Source: National survey autumn 1992: N=253)



In the second round of interviews (spring 1993) few of the teachers interviewed a year before had changed these views; where there was a shift of opinion, evidence suggests this was in favour of the guidelines, largely because of growing familiarity with them.

This trend was confirmed in the survey of November 1993, when both teachers and headteachers were asked if they had changed their views about any of the guidelines. About a third of teachers now found the English language and mathematics documents more helpful than previously thought. Half that proportion of headteachers indicated a similar shift of opinion, but in both populations any shift in the opposite direction was minimal (not exceeding 6% for the curriculum guidelines). This accords with data from the same survey and from the subsequent interviews, indicating that teachers felt more satisfied and at ease with these two areas of implementation as they gained familiarity with the guidelines through practice and training.

Although the guidelines for religious and moral education and expressive arts were published in the latter half of 1992, many of the teachers interviewed early in 1993 had not given them much attention. Consequently, the numbers able to comment on them were small, as indeed as had been the number offering opinions about the draft guidelines for these areas of the curriculum. On the whole, however, those who had expressed views of the draft guidelines for religious and moral education and expressive arts the previous year maintained their view that both these guidelines were more likely to be helpful than not because they provided a structure, and ideas. With respect to expressive arts, concerns were twofold: that teachers would need more expertise than they possessed to implement them, and that the guidelines expected too much ground to be covered. The most evident feature of opinions about the guidelines for religious and moral education was a difference in the way they were interpreted: while they were both criticised and praised for emphasising Christianity, they were also both criticised and praised for emphasising other religious. In addition, several teachers intimated that they felt more comfortable dealing with moral issues than religious issues, and staff in Catholic schools tended to see the guidelines as irrelevant.

It was not until mid-1993 that copies of the published guidelines for environmental studies reached schools, so the 1993 national survey was the project's first chance to gather information about reactions. Asked to rate the helpfulness to teachers of the environmental studies guidelines, about a third of headteachers and a quarter of teachers described them as 'quite helpful', but the majority (53% and 57% respectively) thought it was too early to say. We then took advantage of the 1994 interviews to ask headteachers and teachers how far they thought the guidelines would help them teach the five environmental studies components.

About half the headteachers thought that on the whole the environmental studies guidelines were going to help teachers tackle geography, history, science, information technology and health, but the views of others were divided between those who thought the guidelines would not be helpful and those who felt unable to comment. Reasons given for the guidelines' likely helpfulness were that they would move schools towards achieving better balance within the curriculum, forcing staff to address areas they had not tackled before, and that they would help with school planning and development. Unhelpful aspects of the guidelines included their complexity and 'annoying terminology', a perception that they tried to cover too much ground and that their targets were 'contrived'. There were clearly differences in how headteachers perceived the advice given in these guidelines: for example, one wondered why the guidelines stressed a cross-

curricular approach for environmental studies, as primary schools were unlikely to adopt any other approach, while another criticised them for being 'geared to subjects'. As a result of difficulties such as these, one headteacher told us she had put the environmental studies guidelines 'way down' her list of priorities, saying 'I think it's going to be '96 before I'll really be considering it.'

However, many headteachers were worried about teachers' ability to teach the unfamiliar areas of environmental studies, in particular science and information technology to which one headteacher thought many of her staff only 'paid lip-service'. Previous experience of their lack of confidence in tackling some areas of the language and mathematics guidelines led her to believe her staff would find them threatening:

> *There's not enough breadth of knowledge there for them to feel confident when it comes to imparting it. ... I think we're very good at the biology side of it ... but when it comes to the more basic science side of it, and sequencing, and investigating and problem-solving, then just the same as they did for the maths, they're going to have to find some way of building their confidence.*

One way of providing support to teachers in the areas of science and technology was suggested by another headteacher who reported closer collaboration with the local high school, which had already offered P7 classes the use of its laboratories and equipment.

Classroom teachers proved to be less familiar with the environmental studies guidelines than their headteachers, with almost half the 135 teachers interviewed being unable to comment on them. The vast majority of the others thought them helpful (fewer than ten did not). Teachers considered that the guidelines provided a comprehensive guide to the teaching of the environmental studies subjects, and comprised a framework on which schools could plan topic work in a way that would achieve breadth, balance and continuity. There was a perception that what had passed for environmental topic work hitherto had been primarily language- or art-based 'with occasional sorties into other areas', and that much more was now being asked of teachers if topic work was to be truly environmental. Several teachers commented on the daunting nature of the task ahead of them and stressed the need for extensive support, training and resourcing. Although most teachers did not feel that the guidelines' organisation into five different components implied they needed to abandon an integrated thematic approach to teaching science, social subjects, technology, health education and information technology, some seemed to see and to welcome a return to subject-based teaching, and others to fear it. The most comment criticism of the environmental studies guidelines came from P1 teachers who felt they lacked value at the infant stages.

Activities resulting from the guidelines

The information gathered in 1992 and 1993 revealed that more attention had been paid in the early stages of implementation to the English language and mathematics guidelines than to the others, and that this tendency had continued as time passed. This was dramatically confirmed by data from the survey of winter 1993, in which headteachers responses' indicated that almost all schools across the country were working with 5–14 in the areas of English language and mathematics, and indeed the vast majority of our headteachers reported having started formally implementing these guidelines (see Table 2.1), or having moved beyond that point. Equally most schools had not yet begun tackling any of the three other curriculum guidelines, although more than a third of headteachers claimed they were at the 'early stage of discussion and awareness-raising'.

Table 2.1: Headteachers' assessment of stage of implementation reached in each curriculum area
(Source: National survey November/December 1993. N=140)

	well under way %	*start of formal* %	*awareness-raising* %	*not begun* %
English language	53	38	7	1
mathematics	42	44	14	1
religious and moral education	2	10	38	49
expressive arts	2	4	39	55
environmental studies	0	6	34	61

Although many respondents had indicated that they were 'well under way' or 'at the start of formal implementation', et cetera, we ourselves had devised these categories, giving respondents a forced choice between them. What meaning did the stages have in terms of activity? The last round of interviews in spring 1994 gave us the opportunity not only to ask headteachers again at which stage of implementation they would place their schools' progress, but also to find out why they placed them there. The responses we obtained enabled us to compile groups of characteristics for each of the categories, combinations of which headteachers had commonly used to describe the activities that had taken place. These characteristic activities are given below in Table 2.2.

Table 2.2: Activities typifying stages of implementation
(Source: interviews with headteachers, spring 1994)

awareness-raising and discussion	*start of formal implementation*	*well under way*
auditing of curricular content	teaching programmes matched to guidelines	school drawn up own guidelines according to 5–14
policy being drafted for area under discussion	policy near completion	policy agreed
in-school or Regional inservice	all staff involved in discussion, senior teachers attend courses and report back	good input from Region, many opportunities for staff development
working parties exploring specific themes		working groups carrying out assessment studies for curricular area
staff dipping into document, no systematic use	forward planning begins to reflect guidelines	all staff now planning to guidelines or to school programmes matched to 5–14
auditing of resources	available resources being matched to levels	new resources brought in
	staff implementing some of ideas in guidelines, trying different teaching approaches	
		changes in assessment and recording
		national testing implemented

Use of the curriculum guidelines

In the initial interviews, in spring 1992, headteachers told us that their senior staff were using the guidelines to audit what was being done in the school, as a source of good ideas, in their forward planning and to help them in differentiation. They hoped that all their teachers would use the guidelines to achieve greater balance in the curriculum, through referring to them on an ongoing basis as they drew up their forward plans and thought about collaborative work. At that time, teachers were concentrating on using the guidelines for mathematics and English language; in other curricular areas the guidelines had hardly been used. The documents had most often been used in making a comparison between current practice and what was recommended, with gaps being noted. They were also being used in forward planning and for reference purposes.

A comparison of interview data between 1992 and 1993 suggested that in that time the 'matching' exercise had been completed, and it was clear that using the guidelines in forward planning had become the major activity; however, many teachers also talked about using the documents in a reference capacity.

Table 2.3: *Teachers and headteachers who found individual sections of the curriculum guidelines helpful for various purposes*
(Source: National survey November/December 1993. N=224 teachers; 140 headteachers)

	Framework		**Programmes of study**	
	teachers %	*head teachers* %	*teachers* %	*head teachers* %
forward planning	91	89	80	78
ensures same direction	85	95	74	74
auditing school practice	72	85	59	72
planning staff development	67	70	59	62
help with differentiation	61	56	58	56
finding ideas	45	38	57	55

In the survey of November 1993 we further explored the uses to which teachers were putting the guidelines by asking the sample how helpful they were finding specific sections of the documents (the framework of attainment outcomes, targets and levels, the programmes of study, and the section on catering for needs of individual pupils) for various purposes suggested by previous interview data. A majority of teachers found the programmes of study helpful for all six purposes and the framework helpful for all save one (see Table 2.3), but above all both sections helped in carrying out forward planning and in ensuring that teachers moved in the same direction. Headteachers were also asked for their opinions, but these diverged little from those of teachers (see Table 2.3). A notably higher proportion of headteachers, however, found both document sections helpful in auditing school practice, and thought the framework helped ensure movement in the same direction.

By contrast, the 'needs of individual pupils' section of the documents was found helpful in any area only by a minority of teachers (ranging from 32% to 48%), although headteachers were more likely to have thought the section useful for auditing, forward

planning and ensuring consistency (45% to 56%). Both this and the relatively low ranking of differentiation as an area benefiting from the 5–14 curriculum guidelines (fifth out of six, 61% at most) should perhaps be set beside the view reported below, held by two-thirds of our teachers, that there was no need for more emphasis on differentiation.

Progress with the environmental studies guidelines

All the detailed comments thus far made about the usefulness of the curriculum guidelines related to those for mathematics and/ or English language: so few schools or teachers had experience of work with the other curriculum guidelines that they were unable to comment on whether they were helpful. The interviews in spring 1994 offered the first opportunity to discuss the environmental studies guidelines with school staff. We were therefore interested to find out how the guidelines were being used in schools or, if work on them had not begun, how soon headteachers envisaged implementation starting.

Information from headteachers

As expected, in the spring of 1994 most of the schools we visited had still not started to work with the environmental studies guidelines. Only four headteachers told us they had begun to implement them, two in science specifically. In practice, this tended to mean that staff used the guidelines for planning topics, and had experience of some form of in-service related to the guidelines.

All four stressed that their teachers now planned to the document through consciously building environmental studies areas into their topics, although there was evidence from one headteacher that inclusion of the environmental studies subjects in this way came second to the topic choice as teachers would 'decide upon the topic and see which subject it covered'. In three schools staff had experienced in-service on the environmental studies guidelines; one of the headteachers had also produced a 'position paper' for staff showing how they could tie 'pure' geography, history and so on into existing school practice, and suggesting ways in which they could use the Ginn Science and Technology schemes to help them. As a result, she felt the teachers were clearer about expectations, and more confident in using the guidelines themselves as a reference against the school's teaching plan.

The remaining 21 headteachers told us that at school level they had not yet started to work with the environmental studies guidelines, and most did not anticipate doing so until school session 1995–96, or even later. A small number reckoned that realistically it would be session 1996–97 before they would be ready to get to grips with these guidelines. Several headteachers estimated that they would begin to implement the guidelines in school session 1994–95, but by choosing phrases such as 'we hope' and stressing 'awareness-raising', some suggested that this would be an optimistic estimate in terms of full implementation. One explained how she felt the process would work:

> *I think it will be somewhere in the next session [1994–5] that we will set up a working party to look at how we are going to put them into practice, for the whole of the cluster group ... Next September we will sit down and discuss it [but] that is not even at cluster level – that is just between the Depute and myself.*

Information from classroom teachers

Although only four out of the 25 headteachers interviewed told us their schools had started tackling the environmental studies guidelines, almost a third of the 135 classroom teachers reported having already begun to work with them. In terms of schools this represents:

- four schools where all interviewed staff had begun working with guidelines (this accords with the headteachers' responses)
- seven schools where some of the interviewed staff had begun working with the guidelines, on an individual basis
- 14 schools where none of the interviewed staff had begun.

Clearly, in the seven mixed-response schools, headteachers had all-school implementation in mind when reporting no movement towards implementation, but teachers whether of their own volition or through prompting were beginning to dip into the document.

All 44 teachers claimed to be using the guidelines in forward planning, but the extent of that usage varied considerably. Many teachers qualified their positive response with caveats such as 'only to an extent', 'not formally', 'not in any great detail'. One teacher admitted that she didn't 'have a record to know what I'm covering' but simply made a plan 'and then I see which heading it comes under'. For another teacher the document was more influential in shaping the planning of topic work: she used the guidelines initially to ensure a balance of components in her topic, then planned storyline and activities and would finally return to the guidelines to check which strands were being covered. In the same school, however, a colleague seemed at a loss:

> *We're supposed to use them when planning, as far as possible – but it all seems to hang in the middle of nothing. You're like a candy-floss machine, trying to get all these bits attached to you, but you're not sure that you are [succeeding].*

Such variance was not atypical. Thus in one school, one teacher had substantially altered her planning in a concentrated effort to include science and technology and integrate these into other areas, a colleague was consulting the document 'to check out what can and can't be done' in her given topic, and another colleague was not using the document at all. But in another school, staff were more systematically approaching the science component, as yet only using the 'contexts and contents' key features rather than the skill strands. In several schools we were told the headteacher had issued planning proformae incorporating the five environmental studies components, and this was welcomed by one teacher who found that filling in the sheets helped her gain acquaintance of the document.

Thus the general picture which emerged in spring 1994 was one of a patchy, tentative use of the environmental studies guidelines, with staff in some schools working with the document of their own volition until implementation officially came on stream, a very few headteachers beginning to tackle implementation at a whole-school level, and the majority postponing any movement for the time being. It seems likely that the pattern of use of these guidelines would follow that of the language and mathematics documents, which as we have seen initially served to audit school practice in those areas and then found a dominant role as a reference for teachers' forward planning. We were keen, however, to find out to what extent the influence of 5–14 in teachers' planning sheets had actual impact on classroom practice, and we attempted to chart the changes taking place in our sample schools' classrooms.

■ Changes as a result of the curriculum guidelines

From our earliest interviews, in spring 1992, headteachers had indicated some of the changes they might expect from 5–14 implementation in terms of teaching content and methodology. Teachers themselves did not seem to think that much change in teaching style would ensue, but in the following year's interviews we captured insights into what changes were beginning to take place in the classroom. We therefore returned to this

question in our survey six months later (November 1993), offering teachers a list of ten, and headteachers a list of nine, changes which might have resulted from the curriculum guidelines. Both headteachers and teachers were asked to indicate whether each change had already been made in their school, was planned, or was not in fact needed.

The responses obtained are given in Tables 2.4 and 2.5, with changes shown in rank order both of actuality (already in place) and of perceived irrelevancy (not needed). For the latter category it should be borne in mind that the 'not needed' response is ambiguous as it could represent either the view that change is unnecessary because the desired practice exists already, or the belief that the practice is not desirable. While one might feel it justifiable to assume that teachers approve of group work and differentiation and feel these aspects to be so embedded in present practice that 'more emphasis' is unnecessary, can the same assumption be made in regard to collaborative or subject-based teaching? The data do not allow us conclusive interpretations. What they do indicate, however, are the changes which were most prominent in a representative sample of primary schools in Scotland.

The only changes identified by a majority of teachers and headteachers as already happening were changes of emphasis in existing curricular content and the introduction of additional content. This accords with information throughout our research in which teachers spoke of new emphases on problem-solving, information-handling and oral language skills as major contributions of 5–14 to the classroom curriculum. The replacement of previous content by new and an increase in classroom resources were also fairly widely perceived as happening or likely to happen.

A comparison of the 1993 and 1992 data from headteachers reveals that in 1993 11% more respondents reported a changed emphasis on content, and the proportion of headteachers who indicated that previous content had been replaced by new leapt from less than a quarter in 1992 to a full half in 1993. In addition, while in 1992 35% of headteachers had not thought replacement of content was necessary, the figure dropped to 17% in the 1993 survey.

Table 2.4: Teachers' views on the status of changes in their schools
(Source: National survey November/December 1993. N=224)

	already in place %	*not yet but planned* %		*not needed* %
• changed emphasis on existing content	71	15	• more emphasis on group work	80
• introduction of additional content	68	16	• more emphasis on differentiation	65
• previous content replaced by new	47	25	• lesson planning more structured	53
• lesson planning more structured	36	11	• more collaborative lesson planning	49
• more resources in the classroom	35	46	• more collaborative teaching	48
• more subject-based teaching	30	24	• more subject-based teaching	47
• more emphasis on differentiation	28	7	• previous content replaced by new	28
• more collaborative lesson planning	26	26	• more resources in the classroom	19
• more collaborative teaching	24	27	• introduction of additional content	16
• more emphasis on group work	18	3	• changed emphasis on existing content	14

It will be seen from the tables that there is a significant degree of correspondence between headteachers' and classroom teachers' views, although in general headteachers were more likely than their staff to identify changes as happening or likely to happen, perhaps reflecting the foreknowledge one would expect at senior management level. It may be of interest that an increase in classroom resources was less evident to classroom teachers than to their headteachers. Interesting discrepancies also arise, however, in relation to teaching methodologies. For example, 25% more headteachers than teachers believed that 5–14 was bringing or would bring about more emphasis on differentiation; correspondingly, 24% more teachers did not think such an increase was necessary. Similarly 27% more teachers than headteachers saw no need for more collaborative lesson planning, and perceptions of the necessity for or likelihood of team-teaching were also widely divergent, with 21% more teachers deeming it unnecessary. Or again, although the vast majority of teachers saw no need for more emphasis on group work, headteachers were more divided.

In our earliest interviews with headteachers there had been a view expressed that the 5–14 Development Programme would lead to greater consensus about approaches to teaching and learning; one headteacher, for example, had spoken of her wish to move staff away from a superficial group methodology to one she thought 'more informed and enlightened'. These more recent data, however, suggest a not insignificant gap between headteachers' expectations of developments in classroom method and those of their staff.

Table 2.5: Headteachers' views on the status of changes in schools
(Source: National survey November/December 1993. N=140)

	already in place %	*not yet but planned* %		*not needed* %
• changed emphasis on existing content	72	22	• more emphasis on group work	65
• introduction of additional content	70	20	• more emphasis on differentiation	40
• more resources in the classroom	50	42	• more subject-based teaching	39
• previous content replaced by new	50	33	• more collaborative teaching	28
• more collaborative lesson planning	41	40	• more collaborative lesson planning	19
• more emphasis on differentiation	33	27	• previous content replaced by new	17
• more collaborative teaching	31	41	• introduction of additional content	10
• more emphasis on group work	26	10	• more resources in the classroom	8
• more subject-based teaching	13	48	• changed emphasis on existing content	6

At the same time care must be taken not to exaggerate the implications of these findings; teachers' experience of 5–14 was still mainly limited to the areas of language and mathematics. By the time we interviewed our smaller sample of respondents, in spring 1994, teachers were more aware of the environmental studies guidelines (more than half could pass an opinion on the document, and a third claimed they had 'begun to work' with it), of which one of the effects was perceived to be a need for collaborative planning and team-teaching. It is interesting too in this context that while some teachers also foresaw a shift towards more group work, others felt the document would encourage an increase in whole-class teaching. No generalisations are permissible on the basis of these interview data, and the probability is that the findings from the 1993 survey will be superseded by developments in teachers' thinking as implementation of 5–14 extends to other curricular areas.

Changes needed to implement the environmental studies guidelines

The headteachers' perspective

Although one headteacher gave no response when asked this question, all the others were sure that changes would be needed to implement the environmental studies guidelines. For a few of these, however, the question was put too early as the issue was one to which they still needed to give thought. As one headteacher put it,

> *With the environmental studies document, I'm going to have to get into classrooms and see how teachers can begin, because I've never done it myself. Obviously there are good practices that you can relate, you can transfer them ...*

The other headteachers identified the following as areas for potential change, the list starting with those most often thought likely:

- teaching approaches
- resources
- organisation and planning
- use of staff
- content
- assessment

In particular, it was felt that the guidelines pointed to a shift away from the term-long theme towards coverage of a greater number of more specific and focused topics. These would need to be more content-specific than topics had been in the past, and would entail a greater degree of passing on of information and skills. In turn, this might have the effect of making classroom work more teacher-centred, as one headteacher feared:

> *I don't know how individual teachers will take the guidelines. I think maybe those who are looking to get away from the classroom in which they are not in immediate control of the outcome will ... see this as an excuse to go back [to a teacher-centred approach]. We will have to watch that. Independence of learning is what we have struggled for as long as I remember in teaching.*

In compensation, however, the environmental studies guidelines were also seen as requiring a greater degree of differentiation than had been used with topic work in the past. Changes in teaching approaches were associated with changes in staff use, in particular collaboration between staff to make the maximum use of existing specialist skills and to share ideas.

Some headteachers said they would need to invest in new resources, whether equipment, books or schemes such as the Ginn Science and Technology, to help with teaching the environmental studies subjects. One felt that change was more a matter of reorganising the school's existing resources, while another made the point that staff would have to make more use of the local environment.

Plans for how to use resources would be just one aspect, however, of what a number of headteachers saw as another major area of change, that of the need for more careful planning so that time would be available to cover the greater number of topics and so that staff would have an overall framework within which to work. To this end, several headteachers independently identified the need for the school to create a clear structure of its own for environmental studies. 'I have held off detailed planning, because I knew the new document was coming out,' one told us, 'so we will have to look at the scheme for the whole school, and the guidelines will be our guide for that.' She continued by drawing our attention to the scale of change that would be needed:

> *It will be a really big change that will include planning formats and assessment formats. It will mean having to take into account the other subject areas of the secondary schools. It is a huge area when you start writing down all the things that could affect you.*

A different headteacher, who saw the task as equally huge, thought that to begin with her staff would have to work to a highly prescriptive system in which they would work collaboratively at every stage to arrive at descriptors for each topic, and plan how to overtake targets and statements. Thereafter, the system could be more flexible and teachers' choices within it increased. As the comment quoted above makes clear, changes in the way that achievement in environmental studies was assessed were seen as going hand-in-hand with other changes; but in one case the headteacher made it plain that the school's assessment system for all areas, not just environmental studies, was in need of 'overhaul'.

Although different schools had traditions of emphasising this or that of the environmental studies subjects, over all the interviews none of these areas stood out as being in need of more or less change in content than others.

The classroom teachers' perspective

We have already seen how some teachers considered themselves to have begun working on the environmental studies guidelines even though no steps towards implementation were being made at an all-school level. This probably explains why an eighth of the teachers interviewed could cite changes already made in their teaching or planning, even though headteachers, invited to identify changes at whole-school level, had only spoken of developments as likely or necessary in the future.

All in all more than half the teachers readily agreed that changes would be needed, and over three-quarters could cite specific areas of practice which would be or had already been affected by the document's recommendations. Those teachers who had already implemented some changes spoke of the following areas in particular:

- **planning:** in one school teachers were now planning their topic work collaboratively with their stage colleague. Teachers in other schools said it had been necessary to change their forward planning to accommodate the extra detail and focus demanded by the guidelines;
- **teaching content:** the curricular range was broader, with the introduction or enhancing of science, technology and/or IT, although one teacher complained that she now felt more constrained and limited in what she could teach;
- **methodology:** one teacher was giving her children more practical work, another was doing more whole-class teaching because of the increased need for explanation, and another was covering the different components in concentrated 'bursts' rather than depending on the topic to cover them;
- **subject specialisation:** one teacher was now acting as an in-house expert in science (having gained a qualification in primary science), giving her colleagues teaching ideas and advice on materials.

Effects of this kind were echoed by that third of interviewees who could foresee likely developments. These teachers envisaged:

- additional teaching content, mainly in science and technology
- a move towards team-teaching as a way of meeting the specialist demands of the 5–14 document
- a variety of methodological changes, primarily more group work, but also more differentiation, more practical work, more independent learning, more subject- or theme-based work, and more whole-class teaching
- more detailed and more long-term planning
- a whole-school review process leading to a more structured prescriptive system of topics from P1 to P7, ensuring progression and continuity and avoiding repetition
- more focused, in-depth and subject-specific topics
- more resources, both material and human, to cover science and technology (including the deployment of auxiliaries and outside specialists).

All the teachers who mentioned team-teaching and all but one who referred to a more varied classroom methodology worked within the same Region, which would suggest that Regional input had influenced their awareness of changes likely to follow from implementation of the environmental studies guidelines. One wonders if the concentration on teaching methods which these data suggest are likely will heighten teachers' awareness of the implications for methodological change in other areas of the 5–14 Development Programme.

The effect of 5–14 on specialist help

In discussing their needs in relation to the environmental studies guidelines, many teachers indicated the possibility of drawing on the skills they knew other teachers in their schools already possessed, in effect using these teachers as 'in-house' specialists. Some made reference to the need for visiting specialists. Clearly these teachers were concerned that the skills and knowledge they themselves possessed might not be enough to enable them to teach all aspects of environmental studies without added input.

The issue of specialist help and the possible impact that the Development Programme would have on this arose during the first round of project interviews, when teachers had made it clear they placed a high value on the specialist help they received to teach the expressive arts, and hoped that more would be available to help them implement 5–14 effectively. Because of this, we pursued the theme of visiting help in the last round of interviews by asking headteachers directly whether 5–14 had affected the amount that teachers received. The question was asked in relation to the expressive arts, but the fact that some teachers clearly had the need for specialist help in mind when they commented on the teaching of environmental studies, and that some of the comments headteachers made seemed to have broader implications, makes these data of wider relevance.

In keeping with the fact that many schools had done little to implement the expressive arts guidelines, most headteachers said that the Development Programme had had no effect on the specialist help they received. Some, however, indicated that it had: in one case a teacher had been lost so there had been a reduction, but in two other schools new specialist staff had been taken on. In both these cases the decision to use resources in this way had been the school's. However, there were differences of perspective between them: while one headteacher attributed the school's ability to take this decision to 5–14, the other pointed out that 5–14 had not increased the help available. Interestingly, one of the

headteachers who told us there had been no effect added that the school had been 'fortunate' in this, which suggests a belief that 5–14 would bring about a reduction in specialist staff input.

The remaining few responses indicated that although 5–14 might not have affected the *amount* of visiting specialist help that was available, the Programme had changed its nature in some way. In one school it had focused the ideas of the music and PE specialists more, while in another specialists and teachers were working more closely together:

> *As a result of 5–14, all these specialists are working much more closely with the class teacher, and planning their work through some kind of 5–14 format; and the plans they give to me, for the work they they're going to be doing, is all integrated into the class teacher's work and the document. They are referring all the time to the document ... they are well ahead of the teachers.*

In this school at least, there seems to be the possibility that specialist arts teachers are acting as 'change agents' or staff developers for the teachers they are working with. Another headteacher explained that the Region was likely to change the way it organised specialist teacher provision as a result of 5–14. It was inefficient just now, allocated on a geographical and historical basis:

> *There might be some places with an art teacher and a PE teacher, and some places with none while others have two, so it's not very fairly apportioned. So I think it may change to ... a block of time or something.*

He pointed out that the shift to devolved school management meant that schools would be able to choose for themselves which specialists to buy, which meant that 'People are going to buy the best ones, which is a problem for the visiting teachers themselves.'

5–14: improving children's learning experience?

With implementation of 5–14 well advanced in English language and mathematics, and changes in other curricular areas visible on the horizon to many headteachers and teachers, it was inevitable that the curriculum guidelines would be making some impact at whole-school level and in the classroom. Was this impact improving the quality of pupils' learning experiences in school? In the interviews of spring 1994 we sought the answer to this question, probing particularly for improvements in language and mathematics.

Headteachers' views

Over half the headteachers considered that the Development Programme was contributing improvements to children's learning. The two main advances cited were that 5–14 ensured progression and that it offered a broader range of experiences for children. Comments suggest that headteachers felt this was because 5–14 gave structure, balance and direction to the curriculum and thus helped teachers to plan, and because it encouraged teachers to reflect on their own practice. Such reflection was thought to be particularly important as one of its consequences was a move away from published schemes, and another that it helped teachers to take account of individual children's needs. A typical comment was that:

> *... in the long run it will ensure that every child will have the same chance. I think it will ensure that the language programme, and the children's learning, and the teaching will be effective, and I think we needed that. In mathematics I think it will help as well because it will take us from being directed by the scheme in SPMG to really looking at the needs of every pupil.*

And a teaching head explained:

> *What I do now is explain to children much more thoroughly what I'm expecting from them, so that if I set a piece of work in language, for instance, I will tell them specifically that I'm looking for these areas, and things like that ... And in maths, I'm looking much more at grouping my work into areas of work rather than plodding our way through the books, which I think we did do.*

This headteacher pointed out that teaching in this way could be hard work. 'I find it very difficult,' she said, 'because I'm bobbing about, and I'm grabbing things from various places, and I'm trying to set up little schemes of work for areas ...' However, her overall conclusion was that 'Yes, I'm looking at things differently' and that 'in spite of everything' the effort was worthwhile. Such efforts to look at children's individual needs more closely are, perhaps, not unrelated to another headteacher's view that the 5–14 Development Programme had given a new prominence to school ethos, which was being talked about more. 'I wouldn't have been using the word "ethos" five years ago,' she told us. As a result relationships between pupils and teachers had become 'more civilised'.

Headteachers from different Regions emphasised that 5–14 promoted the kind of learning that children would need in real life. In particular this included talking and listening skills, and problem-solving which developed lateral thinking. One of these headteachers included information technology in her list of skills that would be relevant to the children in later years.

On the negative side, however, several headteachers were certain that the Development Programme had brought no beneficial change. Although one of these believed that 5–14 was encouraging skills acquisition, he felt this was happening at the expense of learning, which he saw as different. The thinking underpinning this view is not completely clear, but his perception seemed to be that the Development Programme encouraged greater formality in the curriculum because this made progress easier to measure, and that skill seekers rather than learners were being encouraged for similar reasons.

A small number of headteachers also suggested that if gains had been made through 5–14, they had been at the expense of other things. Thus they both thought that broadening the range of content covered in mathematics and language had made that content superficial. In the words of one,

> *Children will certainly be more confident in their talking and listening skills, and in their ability to deal with issues and problems in the abstract from their practice in mathematics of problem-solving and information-handling. Unfortunately these skills have meant certain others have been sacrificed like basic grammar and number skills.*

A different headteacher felt that changes in mathematics and language had not been radical enough in her school to have brought about any real differences. However, she stressed that this was her first impression and that time would tell. Others felt that the programme had lacked beneficial impact because it had not been funded, resourced or managed properly at Government level.

A further headteacher who could see no improvements perceived the 5–14 Development Programme to be restrictive in both its allocation to sports time and in its recommendations to teachers, who had been happier in the past, 'choosing what they wanted to do and being quite sensible about it.' However, although he saw no evidence of improvement, he was pessimistic in his view of the wider context in which children moved and did not put all the blame on 5–14:

> *I definitely think that kids had a better education ten years ago, without a shadow of a doubt. But that could be to do with changes in children ... children have changed in ten years as well. They're much less able to concentrate and they're generally disinterested in everything I have to say. We [in the school] think that's to do with TV and computer games. Kids won't follow anything up, they won't take anything home and bring it back with glee.*

Most of the headteachers who made no judgement in response to this question felt it was too early to do so. For one, whatever improvements that might come had been delayed by her teachers' loss of confidence as they tried to implement 5–14. This had meant they did not teach so well as before. Another clearly felt that the quality of the experience children had in the classroom was more dependent on the quality of individual teachers than on maps of the curriculum. 'The children will not learn if the teacher cannot teach,' he said. '5–14 may make some teachers better informed, but it can't make them better teachers.'

Because of changes in management staffing in a quarter of our schools since the initial round of interviews, we cannot directly contrast this very qualified approbation from headteachers after two years of 5–14 implementation to the welcome accorded the Development Programme in 1992. The questions can perhaps be posed, however, of whether with time more headteachers will become aware of benefits accruing from 5–14 in terms of children's experience, and, failing such an increase, with what enthusiasm managers of change will continue to promote innovations which they do not consider to be of benefit to their pupils.

Classroom teachers' views

Similar proportions of classroom teachers as headteachers felt that 5–14 was bringing about improvements in the quality of children's learning experience: just under half of those we interviewed (65 teachers) said this was the case. A further 16 acknowledged certain improvements, but also identified areas of deterioration, while just over a quarter were adamant that there were no benefits in evidence. A fifth of teachers, including some who could cite improvements, believed it was too early to tell.

The positive effects of 5–14 mentioned by class teachers closely echoed those identified by their headteachers, the most frequent being that 5–14

- equipped children with confidence-enhancing life-skills
- broadened children's experience by offering them a more varied and interesting curriculum.

The references to life-skills specifically related to those areas of language and mathematics newly emphasised by 5–14, namely talking and listening, problem-solving and to a lesser extent information-handling, skills which teachers felt would be useful in secondary school and throughout pupils' lives. One teacher's comment was typical:

> *The children are more confident in speaking than before, and the problem-solving is an ideal way to get them to use their heads and really think, in all areas, not just maths.*

Many of the teachers' responses referred to the effects of 5–14 on teaching, with the implication, sometimes made explicit, that the quality of children's learning was similarly affected. Again, most of the points made accorded with the views expressed by headteachers, the main causes of improvement, in teachers' eyes, being that 5–14:

- imparted a consistency and continuity across the primary sector
- was making teachers reflect more on their practice and clarify their aims

- ensured a more structured, better balanced curriculum, and forced teachers to cover areas they might otherwise have chosen to ignore
- would be of help to poorer or less experienced teachers.

Countering or qualifying these gains, however, was the complaint made by a number of teachers that the traditional 'basic' literacy and numeracy skills were being neglected through lack of time, which one teacher thought particularly detrimental to the learning experience of her least able pupils. And while few denied that the curriculum being offered was broader, a recurrent criticism was that quality had been sacrificed to quantity so that nothing was being taught in proper depth any more.

But the most frequently identified cause of deterioration was one which one headteacher had already spoken of as a factor delaying any potential improvements: teachers' loss of confidence in face of the disruption caused by change. As one teacher put it:

> *I think a lot of children going through education at the moment will have suffered because of this shift and the insecurity of the teachers. It's very difficult to teach with any conviction, any positive feelings, if you're insecure yourself. The 5–14 has eroded something that was there, and hasn't yet created something in its place – except insecurity and stress and workload.*

Several teachers also blamed the restrictions imposed by a prescriptive curriculum, which made teachers 'so conscious of what they're doing' and was the reason 'why that spontaneity is often lost', and others bemoaned the loss of quality teaching time.

Although to some teachers it may have seemed premature to expect benefits to manifest themselves after barely two years of implementation, the positive nature of many of these early responses suggests that as teachers gain familiarity with the Development Programme, they may well regain the confidence lost in the trauma of disruption and find their pupils' learning experience enhanced by the reforms. One teacher remarked:

> *I really think that it's made me think more about my teaching and where I'm going, and I'm able to see if there are any gaps that I've missed. Before I just seemed to chug along quite nicely, but I think it's maybe brought me to a standstill and made me say: Just wait a minute here, what are we aiming for?*

And another hoped:

> *It will take a number of years before we really see any improvement in the quality of children's learning, but I think we're going to have quite a nice surprise.*

Summary

By 1994 teachers seemed to be growing more at ease with the guidelines in language and mathematics; little progress had been made in the areas of religious and moral education, and the expressive arts, and even less in environmental studies, but initial reactions to the new environmental studies guidelines from those who had read them were on the whole positive. Having initially served to audit school practice, the documents seemed to be of most use to teachers in forward planning and were seen to ensure consistency of direction among staff, although their usefulness in helping with staff development and with differentiation was also acknowledged.

The main changes cited by teachers and headteachers alike as resulting from the curriculum guidelines were in the domain of curriculum content. Changes in methodology

were not so readily identified, and there seemed to be some discrepancy between headteachers' and teachers' expectations in this area, regarding for example the likelihood of more collaborative planning and teaching or the need for more emphasis on group work and differentiation. Headteachers did not feel that the demands of 5–14 had brought about a more generous provision of specialist help, although there was some evidence of specialists in the expressive arts functioning as carriers of innovation and easing the implementation of 5–14 in that area. Those headteachers and teachers who were prepared to comment on the implications of implementing the environmental studies guidelines predicted developments in teaching approaches and in the organisation and planning of topics across the school: broad term-long themes, they thought, would give way to shorter, more focused topics, clearly structured to ensure balance, progression and continuity in the curriculum. It was also felt that more material and staffing resources would be needed to cover adequately the broad range of environmental studies components.

Perceptions of the impact on children of the changes occurring in the classroom were equivocal, but around half the people we interviewed believed that their pupils were benefiting from a broader range of learning experiences, from the new emphases on oral and problem-solving skills, and from a more consistent, continuous learning experience.

3 Assessment and National Testing

Progress in implementing 5–14 assessment

Data gathered in the first two years of the evaluation pointed to schools being more eager to get to grips with the curricular aspects of 5–14 than to consider and act upon the implications of the assessment guidelines. Although most of the headteachers interviewed in 1992 who anticipated changes as a result of these guidelines had believed that the changes would bring improvements, at that stage all but one could report only intentions: change was not yet under way. A year later, however, headteachers had been able to report the beginnings of change at whole-school level, although some questioned the extent to which these changes were affecting classroom assessment practice.

In the final round of interviews, held in spring 1994, we were therefore keen to find out what stage of implementing the assessment guidelines headteachers considered their schools to have reached, and also to discover at what stage of implementation teachers considered themselves to be. The responses we obtained were in keeping with the earlier data, confirming that implementation had been slow to start but that changes were taking place as staff began to think more about assessment, increased their understanding of the principles underlying the assessment guidelines and started to use them in their forward planning. We turn first to headteachers' views of how far along their schools were in putting the assessment guidelines into practice.

Headteachers' perceptions

Asked this question, the majority of the headteachers interviewed in spring 1994 estimated their schools to be at awareness-raising stage, with a few at the start of formal implementation and a few well under way. A very small number of headteachers, however, did not consider that they had even begun to put the 5–14 guidelines for assessment into practice, despite a lot of thinking and planning.

We organised the characteristics that headteachers were attributing to each of these stages into the table on the following page (Table 3.1).

Because headteachers used these characteristics spontaneously to describe the stages at which they considered the school to be, because there is clearly some overlap, and because one headteacher's idea of 'well under way' would be another's 'at the start of formal implementation', these groupings are no more than a guide to thinking. However, some progression in ideas from stage to stage can be seen.

One particular interview with a headteacher who felt her school could not even think itself to have begun to implement the guidelines may be revealing. She and her depute had spent time with the staff, looking in depth at the concept of assessment, and had discovered considerable lack of understanding. 'My deputewas absolutely horrified to discover that most of them don't really understand what we're talking about,' she said. 'In fact one of the staff came and apologised because she said she'd been teaching for a number of years and she didn't realise how ignorant she was about assessment.' It had been hard to

convince the teachers that assessment came at the planning stage, as they had been used to thinking of it as something that they did at the end. They had also found it hard to focus on the idea of selecting specific areas to assess, to use different forms of assessment and to get away from the 'red pen'.

Table 3.1: Characteristics typifying implementation of assessment
(Source: Interviews with headteachers, spring 1994)

awareness-raising and discussion	*start of formal implementation*	*well under way*
staff had looked at the document		
staff had experienced some in-service and PAT time had been given to assessment	staff had experienced inservice	
requirement to indicate assessment procedures in forward plans	a more structured approach to assessment (regular checklists, tests)	rigorous screening procedures in place
	use of 5–14 language/ concepts	use of 5–14 levels in recording pupil progress
some use of pupil profiles	record-keeping system had been developed (including pupil profiles)	pupil profiles were kept
current practice in assessment had been audited	current practice in assessment had been audited	teachers made their own assessments for each piece of work
	use of pupil self– and peer assessment	the school was implementing a school policy for assessment
		national tests were being carried out
staff had confidence in some areas (language and maths)	staff confidence greater, but not enough to be considered well under way	

Most headteachers interviewed, then, were cautious about claiming that their schools were well along in implementing assessment according to 5–14 recommendations. Data gathered by questionnaire late in 1993 had also revealed caution in that 45% of headteachers claimed their schools were in the early stages of discussion and awareness-raising. Forty per cent felt they were at the start of formal implementation, only 7% claimed to be well under way, and 6% of respondents felt they had not even begun to work on 5–14 assessment.

Was this caution justified? How widely did teachers lack full understanding of the implications of the assessment elements of 5–14, as in the school quoted above? Data gathered earlier in the project strongly suggest than many teachers did indeed feel worried and uncertain about a range of assessment issues. It had proved difficult early in the first year of data-gathering (1992) to gather unambiguous interview data on assessment as people interpreted the term 'assessment' in so many different ways, confusing assessment, recording and reporting. Later in the same year the questionnaire responses had revealed

that such confusion was coupled with a widespread ignorance of the contents of the assessment guidelines, and that teachers thought of the curriculum guidelines primarily as guides to what should be taught, skimming over their implications for methodology. Even by the spring of 1993 few of the teachers interviewed had given the assessment guidelines detailed attention. This slow start in getting to grips with assessment is reflected in the estimates teachers interviewed in 1994 gave us of their progress in this area.

Classroom teachers' perceptions of progress

The 135 teachers interviewed in the spring of 1994 were shown the same scale of implementation stages as headteachers, and asked to locate themselves on it with respect to their implementation of the guidelines for assessment. They responded as follows:

Haven't begun	39
Awareness-raising and discussion	49
Start of formal implementation	38
Well under way	7
Don't know	2

These data clearly reflect the caution shown in headteachers' estimates of progress at school level; indeed, teachers were considerably more likely to think of *themselves* as not having begun to implement the assessment guidelines than the headteachers were likely to claim the *school* had not begun implementation.

It is possible, however, that teachers might be further on with getting to grips with 5–14 assessment than these judgements suggest: there are other ways of accessing 5–14 ideas about assessment than reading and using the assessment guidelines. As two teachers explained,

> *Issues regarding assessment are raised within working parties on reading and writing. These place issues relating to assessment in the front of your mind.*

> *We've talked a lot about assessment in connection with English language rather than the assessment guidelines in general.*

And although, as was stated earlier, teachers chiefly regarded the curriculum guidelines as guides for what rather than how to teach, assessment ideas are built into the curriculum documents; several of those teachers who placed themselves at the stage of awareness-raising with regard to the assessment guidelines added that they were further on than that in terms of assessing language or mathematics. Unfamiliarity with the assessment guidelines need not preclude changes in assessment practice, ultimately driven by 5–14.

There were indications that some of the teachers interviewed were not sure of the extent of their progress. For example, in one school a teacher who had read 'bits of the guidelines' but did not use them felt that she might have started formal implementation. However, she also revealed a lack of confidence about this estimate:

> *I'm doing a lot of assessment but I'm not sure if this is right, according to the guidelines. I use levels in language and sometimes in mathematics.*

In addition, it should be pointed out that of the 135 teachers interviewed in 1994, 51 had still not read the assessment guidelines document, while 39 of those who had read it said they had forgotten what it contained.

5–14 and school assessment policies

The headteachers interviewed during the course of the evaluation were asked both in 1992 and in 1993 how important they thought school policies were in the light of 5–14. On both occasions, a large majority thought they would indeed continue to be important because they enabled schools to take account of local differences, gave teachers ownership of school practice, could link curricular and non-curricular areas and had a flexibility which enabled them to be dynamic and responsive. With regard to assessment in particular, then, it is perhaps surprising that the interviews in spring 1994 revealed that over half the twenty-five 'visit' schools did not have a written school policy for assessment.

The need for an assessment policy was clearly in the minds of many of these headteachers, however, some of whom reported that they had a policy in draft form, with others indicating that they were about to begin work on a draft. A few headteachers were taking a curricular approach to developing assessment in the school, as one explained:

> *What we are doing is writing in assessment at the end of each curriculum policy. So when that is done all I will do is write a covering document that says the language assessment will be in the language policy, and the assessment in maths will be in the maths policy. So there will be a complete statement of assessment in each curriculum area.*

The fact that most headteachers either had or were drawing up school policies for assessment did not necessarily mean that those policies were based on 5–14. We therefore followed our basic question about whether the school had a policy for assessment with another which sought to determine the extent of 5–14 in that policy's development. Half the headteachers who told us that an assessment policy was in operation claimed that the Programme had shaped it, whether totally or to a large extent. Asked, for example, how far 5–14 had been an influence, one told us,

> *Very much so. As in the guidelines, this policy considers the five elements of the assessment process – planning, teaching, evaluation, recording and reporting.*

In addition, most of the headteachers who were working on draft policies also claimed that the Development Programme was shaping their thinking. Some of the effects of that influence included use of 5–14's 'levels' and learning outcomes concepts, greater emphasis on pupil assessment and more documentation of pupil's progress, perhaps through pupil profiles.

For what reason might a school *not* have based its assessment policy on 5–14? As this was not a question we put directly, the data available do not come from a complete data set; however, they do provide some insight. One headteacher's response raises the possibility that some schools might have needs which would not be adequately addressed by 5–14. Her school was situated in an area of great social deprivation, and its pupils had a wide range of special needs. 'The assessment policy is largely based on my own experience of special education,' she told us. 'We have a very tight, rigorous system of

assessment which allows us to identify children at risk at a very early stage, and intervene at the earliest possible opportunity.' It is not clear what kind of risk was uppermost in her mind. Other headteachers indicated simply that the assessment policy the school already had was satisfactory without much change as a result of 5–14.

If having and following a whole-school policy for assessment, based on 5–14 guidelines, is an indicator of a school's being 'well on the way' to implementing the assessment requirements of the 5–14 Development Programme, as is suggested by Table 3.1, another indicator could well include having a positive attitudes towards the guidelines. The way in which head and classroom teachers' views of the assessment guidelines developed from early 1992 to early 1994 is explored in the next section.

Headteachers' views of the assessment guidelines

According to headteachers returning the questionnaires in December 1993, views about the assessment guidelines had remained relatively stable. A small percentage (16%) found them more helpful than previously, and an even smaller group (5%) found them less helpful than before, but the majority had not changed their views since December 1992, which with respect to Parts 1 and 2 (the dark blue booklet) had been:

like them very much	*like them a little*	*dislike them a little*	*dislike them very much*	*cannot comment*
27%	64%	7%	3%	0%

(Source: questionnaires to headteachers, December 1992)

In addition, the 1992 questionnaire data had been able to establish that the assessment guidelines were thought sensible and easy to assimilate.

The questionnaire findings, though interesting, lacked detail. The interview round of 1994 offered the last opportunity to discover more about what headteachers saw as the strengths and weaknesses of the assessment guidelines. All but one of the headteachers interviewed took the opportunity to comment; we shall take views about strengths first.

Strengths

A major strong point was that these guidelines emphasised assessment as a central part of each of the key features in a five-part, cyclical process, and that it was thus embedded into every aspect of teaching. This was one of the few perceptions of strengths about which there was strong agreement. Comments made by several headteachers strongly suggest that prior to the introduction of 5–14 teachers used to see assessment as a separate and summative activity, in contrast with which view assessment as described in the guidelines was 'not just something you do before parents' night or before writing reports at the end of term', 'not just a sort of end of year exercise that you do for some unspecified reason – you think society kind of expects it' and not 'doing tests on a Friday or at the end of term'. More generally, a small number of headteachers felt that the guidelines flagged the importance of assessment, raising its status in teachers' minds to make it equal to the importance they perceived in the curriculum.

Several headteachers thought that the guidelines were clearly based on common sense and existing good practice, and saw this as strongly in their favour, partly because it

implied positive feedback for those teachers who saw their own approach to assessment reflected in it. Others praised the guidelines for encouraging teachers to reflect on their current practice, and saw this opportunity for reflection as a good starting point for future development.

Other strengths included:

- the guidelines' emphasis on pupil self-assessment
- their encouragement of provision of detailed information about pupil progress
- the guidelines' flexibility
- the fact that they were accessible, being simply written and clear
- their encouragement of pupil profiles
- the excellence of the support materials (which it was felt schools under-used)
- they acknowledged the value of teachers' professional judgements but also recognised the need for written confirmation

Weaknesses

Going to the other extreme, the most commonly identified weakness in the assessment guidelines was thought to be their over-emphasis on written records of assessment. Some teachers made it plain they thought written records were unnecessary. 'When you've got a class of 16 or whatever, I really honestly could tell you what every child is capable of anyway,' one (a teaching head in a small school) told us. Another headteacher's response implied that there was something obstructive about wanting to keep written records of assessment: it was 'almost creating an intervention which doesn't naturally exist in learning'. A small number of headteachers appeared to have national tests in mind rather than records of assessment in telling us their staff were suspicious that they and not the pupils were being judged, and that the results revealed nothing new. Perhaps predictably, there were several objections to the amount of recording required on the ground that in the time available it would be impractical. One explained,

> *If you did everything you've got to do, it's an impossibility, it really is. You know, just assessing every bit of work at the level that it [the document] would suggest you do, it would be a never-ending task.*

Indeed, the view that carrying out the recommendations of the assessment guidelines more generally would be time-consuming was the next most common complaint. The guidelines were thought 'fine on paper' but in the words of one headteacher it would be difficult to put them into practice:

> *Asking teachers to find easy, reliable ways of accurately assessing is a slow procedure, and will have to be built on highlighting existing practice.*

A further weakness was thought to be that assessment was treated as an issue separate from the curriculum by having its own distinct document. This took assessment out of context and made the concept more difficult for teachers to come to grips with. For this reason, in unpacking the assessment guidelines for her staff one headteacher had chosen to deal with the issues in relation to each curriculum area in turn, rather than looking at the guidelines in isolation.

Other ways in which the guidelines were thought weak included their shortage of working examples – 'They keep telling you what to do but they never show you how to

do it' – and, interestingly, the view that they should have included national testing. The person who thought this explained that in practice national testing would be part of a school's assessment procedures, as it was unrealistic for a school to set it up in any other way. Hence,

> *If the national tests are going to be part of your assessment procedures within the school, then they should be part of 5–14, and they should give teachers a wee bit more guidance on appropriateness, the best way [to carry them out]. I think we've been left very much to work all this out ourselves, and it should have been integrated.*

One headteacher, but only one compared to the larger numbers from previous years, saw the requirement for teachers to place pupils at particular levels as a weakness, from which we infer that her criticism was that this was 'labelling' children.

On the whole, then, both the headteachers returning questionnaires at the end of 1993 and those interviewed early in 1994 welcomed the assessment guidelines, mainly because they stressed the centrality of assessment to the entire teaching process and put paid to the idea that assessment was a separate and summative activity. The guidelines were thought to be based on existing good practice and would provide a sound starting point for further staff development. In contrast, the chief criticism made of them was that they put too much stress on written records of assessments – a complaint which generated others about impracticability and workload.

■ Teachers' views of the assessment guidelines

The December 1993 questionnaire showed that teachers' views of the assessment guidelines, like those of headteachers, had remained relatively stable since the previous year. 12% of respondents considered them more helpful as time passed and 6% less helpful, but the majority of 75% had unchanged views. In December 1992 these had been:

like them very much	*like them a little*	*dislike them a little*	*dislike them very much*	*cannot comment*
6%	40%	12%	4%	32%

(Source: questionnaire to teachers, autumn 1992)

Again, these figures lack detailed insight into reasons, so as with headteachers, we asked the teachers we interviewed in spring 1994 for their views of the assessment guidelines, asking them particularly to say what they thought were their strong and weak points. However, at the time of our previous visit, many of the teachers had not read the assessment guidelines. Before we began to probe their views about them, therefore, we needed to ask whether the document had yet been read so that we would know how much weight it would be appropriate to place on the opinions expressed. As was stated earlier, we found that a large group, about half, had not yet read the guideline document:

Yes, read	45
Only dipped into/read but forgotten	39
Not read	51

Among those who had not read the guidelines, however, were many who claimed to have some idea of what was in them through staff discussion and attendance at in-service training; perhaps because of this, more people felt qualified to comment on the guidelines than had actually read them. Of this group of 56 interviewees, two thirds expressed approval, which for many was unqualified, with the others tending to feel negatively about the guidelines. Perhaps because the group of teachers who commented on the guidelines contained some teachers who had not read them closely, their responses to questions about specific strengths and weaknesses tended to be couched in general terms, and echo comments made about other guidelines.

Strengths
These can be summarised as follows:

- The assessment guidelines were making teachers think more of assessment, in its various forms (including peer- and self-assessment), across the curriculum and throughout the teaching process
- They would help formalise assessment within schools
- They amounted to a formalisation of current good practice
- The guidelines were useful because 'anything to do with assessment [is] welcome ... because assessment is quite a new thing for many teachers'.

Weaknesses
These were that:

- The guidelines were too vague on the specifics of how to assess – exemplars were needed, or unpacking through in-service
- They were not helpful for children at pre-level A stages, and gave an inappropriate model for assessing children with specific disorders
- Apart from the emphasis on written assessment, they contained nothing new.

In illustration of the first point, one teacher told us:

> *It [the guidelines document] doesn't offer any examples of how you can assess, which I think is what most teachers are looking for. It tells you* what *you should be assessing, but not particularly* how *you should be assessing and recording it. That was my main disappointment. They've been fairly specific in what they wanted us to do in all the areas of the curriculum – I think if they'd been a bit more specific about the assessment...*

Several teachers made it clear that their negative judgements were provisional, sometimes based only on superficial acquaintance with the guidelines, with the implication that with further training in and experience of the document's recommendations positive points might emerge.

However, one teacher who found the document 'all right to read' but its practical implementation 'horrendous' was not alone in her views. Recording and reporting were

what seemed to concern most people, as it was the written aspect of assessment which elicited most comments. It was acknowledged that this would provide useful detailed information on the progress children had made and the problems they had encountered throughout their time in school, which could be of use as children passed from one teacher to the next. But equally teachers felt strongly that the amount of record-keeping demanded was unrealistic given the time and workload implications, and also that the amount of detail asked for was unnecessary – who would read it?

> *The teacher often holds a lot in her head about the assessment of a pupil ... Many teachers don't read the present reports, so why should they read a more detailed one?*

> *There is a lot of assessment at every area of the curriculum which is not necessary. A lot of primary assessment can be discussed verbally as the classes are very small and teachers communicate a lot more than they do in secondary schools.*

Classroom teachers, then, tended to be less well qualified than headteachers to judge the assessment guidelines, as many had not read them in enough detail to do so. That said, those who did feel they could comment tended to approve of the guidelines rather than not. They were appreciated as a spur to think more deeply and innovatively about assessment, and welcomed because they would bring great structure to school assessment. On the other hand, some teachers felt the need for more practical guidance, while an overwhelming worry was the amount of written recording that it was feared implementation of the guidelines would engender.

On the whole, therefore, both teachers and headteachers approved the principles of the assessment guidelines and seemed to welcome them as an incentive to put assessment on the agenda for action. To what extent were these positive views being translated into action? What use was being made of the assessment guidelines, and what changes were taking place as a result?

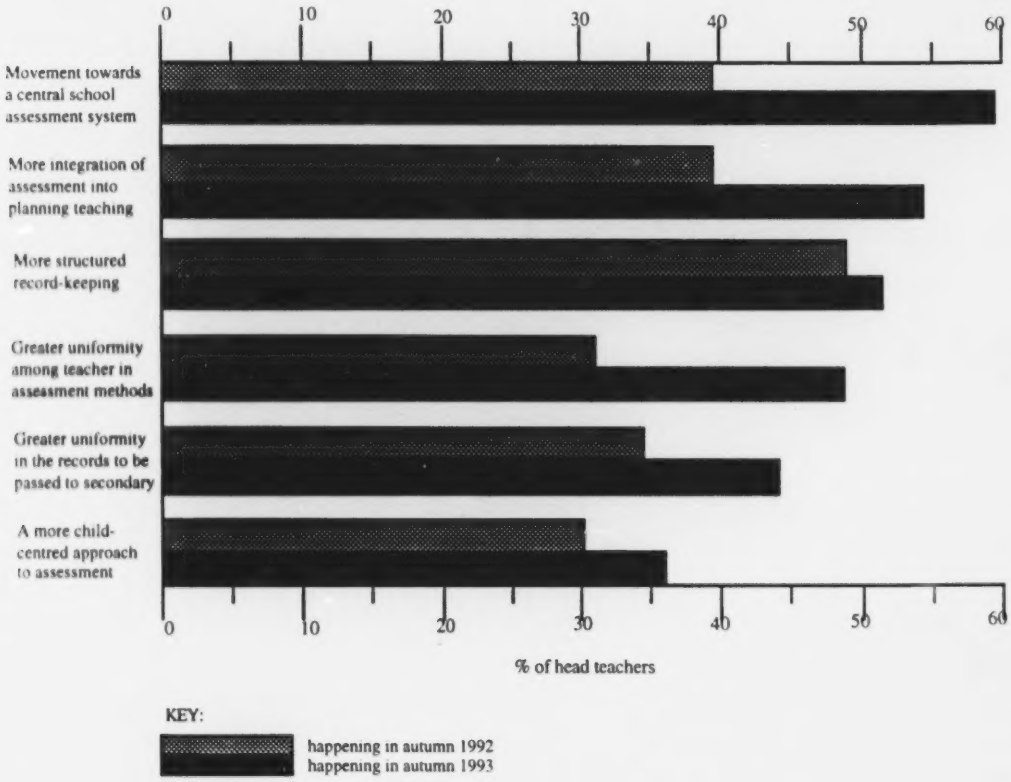
Whole-school use of the assessment guidelines

Whatever were thought to be the strengths and weaknesses of the assessment guidelines, the 1993 interviews had made it clear that almost all the headteachers were sure they would bring about whole school changes and that such changes would be welcome.

From information gathered in the first year of the project we knew that headteachers had particularly wanted to use the 5–14 assessment guidelines to put central school systems of assessment into place. Figure 3.1 on the following page shows they achieved a measure of success in this. Through a comparison of questionnaire data from 1992 and 1993, the figure illustrates both what kinds of whole-school changes were taking place over time, and which were most commonly occurring.

As the figure shows, in 1992 the most common response to the assessment guidelines had been the instigation of moves towards more structured record-keeping. The following year, although this process started in other schools, movements towards establishing central school assessment systems and ensuring that assessment was more fully integrated into the planning of teaching were more widespread.

Figure 3.1: Headteachers' Views of Changes in Assessment, 1992 and 1993
(Source: National surveys 1992 and 1993. N=157 and 140)



Teacher use of the assessment guidelines

The establishment of central school systems does not necessarily mean changes at the level of individual teachers, however. A requirement to build assessment into forward plans may lead to those plans being manifest on paper but cannot guarantee change in the, as was made clear by one teacher interviewed in 1992 who referred to her forward plan as the 'Book of Lies'. In the spring interviews of 1994, therefore, we asked teachers directly if they were using the assessment guidelines, and discovered that most were not:

Yes:	39
No:	77
Not sure/possibly but not directly:	19
Total:	135

Many teachers offered the further information that the areas in which they were using the assessment guidelines were mathematics or English language. The data we have on progress in other curriculum areas (see chapter 2) suggest it is unlikely that many teachers were using them in other areas of the curriculum.

The interpretation teachers put on the concept of 'using' the guidelines varied. As we have already suggested, some people, even though they might not have read the assessment guidelines in any detail, felt they were enough aware of the ideas to be following the guidelines' recommendations. The following comments illustrate how broad teachers' notions of what constituted using the guidelines could be:

> *We're all very aware of the core ideas, that you've really got to get your planning done, get your evaluation, got to do some sort of formal or informal assessment so that you can do the next part of your planning. As for the details, I think that's something that will be worked on.*

> *I'm using them loosely – I'm aware of the different ways of assessing the children: observation, written work. Maybe I wouldn't change the way I assess the children, but I'm more aware of how to tie in what I do with 5–14.*

Other teachers thought they might be implementing the guidelines without knowing it, perhaps on the assumption that 5–14 assessment was unlikely to involve anything substantially different from their current assessment practice. Hence one teacher told us she was 'not consciously using them, though in practice [she might] well be' while another claimed, 'Indirectly I think I'm using them in English and maths.'

Other teachers, though they were not using the guidelines directly, were adapting their practice in the light of school documents which they presumed or knew to derive from the 5–14 guidelines. Hence one teacher told us she was 'using the headteacher's guidelines based on 5–14,' while another commented,

> *I'm just using the school's own assessment. I'm sure our own assessment came from the 5–14 document but I don't actually use the document.*

In five schools teachers were studying the guidelines in PAT or in-service as a step towards agreeing a school assessment policy and devising a recording format for language and/or mathematics.

Such activities help to explain why, in spite of not feeling they were formally implementing the assessment guidelines (and in many cases not having read them) teachers thought of themselves as being influenced by them, as is shown in Table 3.2.

Table 3.2: Strength of various influences on teachers' assessment

(Source: National survey, November/December 1993. N=224)

	very much influenced %	*a little influenced* %	*not at all influenced* %	*no response* %
• my own ideas about assessment	67	29	1	3
• the 5–14 assessment guidelines	51	42	2	5
• the school assessment policy	50	30	10	9
• Regional guidelines for assessment	24	51	17	8

These responses also confirm the strong influence of teachers' own ideas about assessment and, to a lesser degree, school assessment policies. In practice, however, earlier phases of the evaluation showed a large degree of consensus between 5–14 and school policies generally and suggested that school policies are devised along participative lines. If this is so, some agreement between those policies and teachers' own ideas can be expected.

Changes in individual teachers' assessment practice

We have shown that headteachers felt the assessment guidelines were bringing about a number of changes in schools, such as the movement towards a central school assessment system and more integration of assessment into planning teaching, and have also suggested that whole-school movements towards change need not be followed by changes in assessment practice at classroom level. Asked to indicate, from a list of suggested changes, whether they were happening, likely to happen or not needed, teachers returning questionnaires in December 1993 revealed the changes indicated in Table 3.3 below.

Table 3.3: Changes in assessment which were happening, likely to happen and not needed – teachers' views

(Source: National survey November/December 1993. N=224)

	Happening	*Likely to happen*	*Not needed*	*No response*
	%	%	%	%
• greater attention to keeping records	66	27	6	1
• build assessment more fully into lesson planning	57	28	10	5
• assess 'difficult' areas such as creativity, listening and talking more often	52	33	10	5
• give more frequent written tasks for the purpose of assessment	45	19	33	3
• now use a formal school recording procedure	38	51	5	6
• now use a formal school assessment procedure	31	53	9	7
• put more emphasis on differentiation	31	12	51	6
• use more pupil self-assessment	30	41	23	6

Thus over half these teachers claimed to be making changes in that they paid greater attention to keeping records, were building assessment more fully into their lesson plans and were assessing difficult areas more often than they used to do, with a further third believing that such changes were likely to come. Over half thought that formal school assessment and recording procedures were on the way.

This information seems to be slightly at odds with responses from the interviews of spring 1994, which revealed that most of the 135 teachers interviewed did not consider themselves to have made changes in the way they assessed pupils' progress as a result of the assessment guidelines. Two possible explanations for this suggest themselves. One is that in the questionnaire some teachers might have given indications of pressure for change at whole-school level, rather than of changes they personally had made. Another possibility is that teachers might not have regarded doing 'more' or 'less' of something that was already part of their established practice as change.

Several of the teachers interviewed stressed they had not made changes 'yet', implying that in future they might. Those who had made changes specified that:

- they made more records of assessment
- their assessment was more conscious than before
- they saw more opportunities for assessment
- they were more conscious of levels and more confident in using them
- they collected more evidence of achievement
- they assessed more individually.

Changes in record-keeping

Data already presented have suggested that whole-school movements towards more structured record-keeping had caused most teachers to give greater attention to the assessment records they kept. Perhaps because of this, and in some contrast to the relatively small numbers who claimed to have made changes in the way they assessed, when teachers interviewed were asked if they had made changes in the way they kept these records, well over half the teachers interviewed replied that they had.

Many of the changes made seemed related to whole-school drives for greater structure. Hence the most common change, whether implemented or impending and reported by 34 teachers, was the use of new recording formats for either mathematics or language or both. Although the data do not always indicate the precise nature of the recording format, the norm seemed to be the 'checklist' or 'grid' type, where a child's progress was recorded against each strand of maths or language in terms of 5–14 levels. One school used three 'rates of progress' (1: experience of strand, 2: making progress and 3: secure on strand), while in another teachers inscribed the level termly and circled it when 'captured'. National Testing scores might also be recorded on these sheets. Colleagues in the same school had benefited from a 'progress checklist' which came with the regional mathematics programme, and teachers from several other schools used the recording systems which were built into commercial schemes such as Heinemann mathematics and the Ginn 360 reading scheme. In one school, teachers credited their deputy headteacher with having devised 'maths progress sheets', and other teachers from four schools mentioned formats which had been developed internally. Teachers from two associated schools shared the same format developed by their area group.

One teacher used a grid obtained from a teacher training college, but to record the mathematics strands she had covered with the class rather than to chart individual pupils' progress, 'just to tick as you go along, what you've been doing,' as she put it. 'It's a reasonable way to see whether you're actually balancing the curriculum or not.'

Another development in recording systems, mentioned by teachers from seven schools, was the increased used of pupil profiles (or pupil progress reports), and several teachers noted a more systematic retaining of evidence as a record (pupil language folders, hang-up bags).

For one teacher, the move towards more formalised systems which recorded 5–14 levels meant that she no longer used 'general sweeping statements' such as 'she's doing well in maths.' In addition, as assessment became more focused, the areas in which children's progress was recorded were more numerous: rather than limiting formal records of progress in language to reading and writing, some teachers reported a more formal recording of talking and listening skills, while in mathematics a small number

mentioned that they recorded progress in problem-solving. A small number of teachers also told us they recorded progress in PE.

Although increases in the amount of recording done do not necessarily entail changes in the way those records were made, a recurrent theme in many interviews was that there was now much more recording, and much more detailed recording, being done. The following remarks were typical:

> *I'm much more aware that I have to take notes rather than just relying on my professional judgement.*

> *I have a notebook where I write anything from social, moral or mathematics ... Before, it was there, but in my head. Not written down.*

The workload implications of this did not go unremarked, however, especially in one school where several of the teachers interviewed pointed out that the co-existence of old and new methods resulted in duplication. 'We have to record all the strands for language, and also in mathematics, but using progress testing,' one teacher told us. 'I still have a mixture of old and new recording – bits of paper for everything.' Another commented,

> *The only change [in the way I record assessments] is in quantity – we're trying to record everything! There's assessment profiles plus ticksheets for mathematics, ticksheets for reading, ticksheets for handwriting and spelling, scores for problem-solving, pupil profiles and folders. We're trying to find ways to speed up the record-keeping, we feel encumbered by sheets of paper.*

Standardisation in the use of levels

It seems, then, that teachers were increasingly following central school assessment systems, some of which still needed considerable streamlining to make them workable. These required them to keep detailed records of children's progress and to make those records in terms of 5–14 levels. How useful those records would be seems likely to depend to a large extent on how well teachers felt they had grasped the concept of levels, and on how far different teachers shared the same understanding of what they meant. Data gathered earlier in the evaluation made it clear that while on the whole both headteachers and teachers thought the idea of levels was a useful one in itself (Interim Report, 1992), there were some concerns about how far different teachers would share an understanding of what each level meant in terms of progress. Accordingly, in the last year of the evaluation we were interested to find out how confident teachers were when they referred to 5–14 levels, and whether there had been any attempts to moderate the way that the levels were used.

Staff agreement about levels – headteachers' views

Asked how far they thought their staff were in agreement with each other in their recognition of work at level A, B and so on, over half the headteachers interviewed felt that on the whole the level of agreement was generally quite good. Several qualified their responses, however, either by making it clear that they were thinking only of the curriculum areas with which their staff were most familiar (mathematics and English language) or by pointing out that while it was relatively easy for staff to reach agreement about the meaning of levels in mathematics, it was much less so in language work, especially when this was written language work. 'Gauging a level in maths and reading is fairly easy; writing is much more difficult' was a typical comment.

Some headteachers offered explanations as to why they felt reasonably comfortable that staff agreed about levels. The most common was simply that teachers had practice, which was especially valuable if they worked collaboratively, planning and discussing work together, as one headteacher explained:

> *Composite class teachers confer with each other about the stage that they are at and how they are going to approach the particular things. I would think there is a very good understanding.*

Other headteachers mentioned the value of in-service.

However, one of the headteachers who felt that her staff 'were on similar lines' when it came to judging the level of work revealed a reluctance to be objective about children's achievements which leads us to wonder whether she had misunderstood the purpose of levels:

> *What could be a piece of C work for one child might not be for another, it depends on what their background is and you would err – let's say if it was a borderline case and you know that the child had a poor background and all this, you might err up the way.*

We have no means of knowing how widespread might be such an interpretation of how levels should be given to a piece of work.

Some headteachers were unable to give an opinion, though one of these was clearly aware that the issue was important and needed to be addressed. Interestingly, one made the point that it was easy to make false assumptions about the degree with which staff shared views of levels:

> *I thought they were going quite well until ... I asked a question about meeting a target ... Two teachers had different interpretations of what was required. So if you had come two weeks ago and asked me that question, I [would have said that] I think most of our thinking would be the same. But it's not. And it's not until you get a chance to sit down and ask that kind of question ...*

Such a comment leads one to wonder whether any of the headteachers who had thought their staff were in agreement might uncover similar inconsistencies should they get 'a chance to sit down and ask that kind of question'.

Several of the headteachers interviewed knew that there was disagreement among their staff about how to recognise levels. Some of these explained that the teachers lacked confidence, which in one school was linked to their struggle to understand assessment generally – 'They are bogged down with the idea that assessment is a written test'. Another headteacher described inconsistent levels interpretation among her staff as 'a major problem', while another stressed the amount of work the school's cluster group was doing in this area, especially with writing. Others commented that their staff needed training.

Some headteachers made comments which point to National Testing as an important factor, one way or another, in bringing about agreement about levels between staff. One of these headteachers thought that using the tests, which his school was doing 'as part of ongoing assessment' in mathematics, had helped teachers to recognise the levels, while others anticipated an improvement in staff consistency when testing began. 'It's a worry,' said one, but added,

> *National Testing helps with that. I did National Testing a couple of years ago and they show you how to mark it – you can gauge it better which category it would fit into. Not all staff have used that.*

In another school we were told that teachers' concerns about the difficulties they were having recognising work at different levels had emerged when the school's strategy for National Testing had been discussed: problems had become evident when teachers marked the language work. 'There are large discrepancies between teachers [and] they are insecure about making the decision,' the headteacher told us.

We followed our question about the confidence of a school's teaching staff to recognise levels of work with a similar question, which asked headteachers if they believed there was agreement with staff in other schools about the interpretation of levels. Perhaps not surprisingly, over a third of those interviewed felt they had no grounds on which to base a view. However, other headteachers thought that on the whole there was agreement about this within school groups, though it must be added that many qualified their responses in some way. Two, for example, felt that there was general agreement among primary school staff, but that high school teachers thought in such different ways about assessment and, indeed, approaches to teaching, that there was unlikely to be agreement between the primary and secondary sectors. 'All the secondaries wanted,' one headteacher told us, 'was National Test results so they would sort their classes out from that.' She continued:

> *They thought that if you could prove they [the pupils] were up to level D on the National Test results they would go on from level D to level E. It's not as easy as that, because a child might be at level D in number and measurement and level C in problem solving, because of their language problem.*

A different headteacher's qualification was that while reaching agreement in mathematics had been relatively easy, doing the same with regard to written work was much harder. Others stressed that although they believed there was overall agreement among staff within their own and other schools about the meaning of levels, they had not had the opportunity to test out this belief. 'With the cut-backs in in-service staff are not getting together the way they used to,' one explained, 'so the opportunities for collaboration are extremely limited.' Some kind of moderating process was needed.

Most of the headteachers who felt that, on the whole, staff across schools did *not* have similar notions of what constituted work at a given level had stories to tell of cluster group or similar experiences in which differences had become apparent, not only between the primary–secondary sectors but also between primary schools. Unlike some of the headteachers who believed there was likely to be agreement, they were able to base their views on personal experience of how differently teachers could interpret the same level.

The teachers' perspective

Interviews with the teachers tended to confirm the headteachers' view that large numbers of staff did feel comfortable with their ability to recognise 5–14 levels, though in particular subjects, not all. Confidence was greatest with respect to English language and mathematics, and with respect to certain levels only:

– confident within certain levels only	24 teachers
– confident with respect to mathematics and English language	22
– confident with levels generally	17
– confident, but not with mathematics	13
– confident, but not with English language	10
– not confident	26
– no data	23

Again confirming a view already expressed by headteachers, some teachers commented that testing had helped them to understand the levels.

Asked how far they thought their understanding of a level would be the same as that held by other teachers, as many as 66 of the 135 thought there would be agreement, though many of these thought that there would only be a shared understanding between teachers who worked closely together. Only half in this group had experience of such agreement. A further 33 of the 135 teachers thought agreement would not be likely. A few said this from experience of discord; others believed that teachers' assessments, especially of writing, were too subjective to make agreement likely, while some did not think teachers knew the levels well enough. Not surprisingly, many of the teachers to whom we put this question had no view to offer as they had not thought about it before.

Help with the moderation of levels

Although over half the headteachers felt their staff were more or less in agreement with each other as to what the levels meant, then, and many of the teachers interviewed felt confident in their ability to use them, the qualms of other headteachers, some of whom had given the matter detailed attention, and the limited confidence expressed by many of the teachers interviewed, suggest that help with understanding the levels would have been appropriate in many schools. What such help had there been, and how successful was it?

Headteachers' views

Asking headteachers this question revealed that in 15 of the visit schools there had been organised attempts to achieve moderation of levels. These were more likely to have been set up through the headteachers' own initiative within their own schools or within the cluster groups than to have been organised by Regional Authorities. Only a few of the headteachers interviewed made mention of specific initiatives set up by the latter, all of which had been language-oriented. One headteacher, recalling the 'day' on writing, implied that it had been targeted at the wrong people: 'Unfortunately,' he told us, 'it was restricted to area group representatives.' These had all held senior management positions.

As far as in-school initiatives were concerned, several headteachers stressed the value of giving staff opportunities to discuss criteria for levels with each other. PAT days offered such opportunities, as did the active encouragement of collaborative working. One headteacher spoke of the school's 'partner' system which was a mechanism to enable staff to exchange views. That structured discussion could bring results is clearly illustrated in this headteacher's experience:

> *In maths ... we went through every process that we teach and we checked that we were all using the same approach. We even agreed a common language, plus or minus or add and take away. We went into it in that kind of detail ... It was quite alarming actually because when we did that we were all amazed at what came up. We argued it out, that kind of thrashing it out until we reached a consensus and agreed that that would be the way forward.*

In addition to opportunities for discussion, headteachers had sometimes organised in-service days for staff on specific topics: one of those we spoke to had asked the visiting drama specialist to give the staff such a day on levels in listening and talking. Or the school might take further, for its own benefit, work being undertaken within its cluster, area group or whatever: some headteachers furnished examples of this being done for assessment of language and mathematics work.

There is some evidence that the work done on a cluster basis was thought to be particularly valuable. One headteacher referred to a cluster activity as 'the main one' while another stressed that it was the cluster working party which had brought group thinking together. Curriculum areas addressed seem to have been restricted to mathematics and language, as no mention was made of any others. Activities tended to focus on the production of exemplar material. Schools in one cluster group were bringing together examples of work, worksheets, tests and so on, so that they could 'level' them to provide a bank of reference material, and a similar exercise, though less specifically aimed at a reference bank, was taking place in a different cluster. Another cluster focus was packages of teaching materials for different levels in mathematics. A third focus was simply to establish agreed criteria for strands and levels.

Although they could not be described as deliberate attempts on the parts of the schools or clusters to achieve moderation, one headteacher commented on the value for that purpose of the increasing number of publications which made reference to 5–14 levels rather than Key Stages:

> *Most publishers are now looking very much towards that, and that should be a great help to teachers when it comes to assessment, when they see the activity they're undertaking, look in the grid and see that it's such and such an attainment.*

Similarly, another pointed out the usefulness of a forward planning sheet that forced teachers to think in terms of specific targets. 'It draws your thinking together,' she said, and continued,

> *I'm saying to them, I definitely want targets numbered. I want targets stated. The working group didn't want targets stated, so it was a top-down decision ... But I know that the Inspectors are going to ask me.*

This comment also reveals resistance within the working group to using targets; it would be interesting to know why. Half the headteachers who reported that nothing had been done to help teachers with moderation of levels recognised overtly that the issue needed to be dealt with. One had discussed it informally with her staff, and had reached the conclusion that given enough practice and familiarity with the levels, they would find the problem would sort itself out.

The teachers' perspective on the help given

About half the teachers interviewed could recall having help in understanding the 5–14 levels, though some people pointed out that the help had been given over a year before. They remembered support of various kinds, from in-service courses outwith school to informal conversation between teachers. In-house in-service had been the most common form of support reported.

Not all, however, had been thought helpful. Views about this varied, and all the teachers who said the Regional in-service had helped them nevertheless added that further practice based on actual work by children in their class would have been more useful. Several teachers who did not consider the support they had received to have useful added that staff had discussed the use of levels among themselves, but there had been no help of a formal, structured nature – 'no courses and no practice'. However, another teacher who had experience of a PAT session devoted to moderation thought nevertheless that 'confidence comes from discussion with your stage partner rather than from staff as a whole' and yet another had found in-school discussion of pupils' work more useful than

the cluster group meeting which had followed. Indeed, one teacher had felt demoralised by the 'help' received: opinions had differed so widely among associated schools that personal confidence was further undermined.

A number of teachers pinpointed the assessment of writing as particularly problematic for teachers seeking to award levels with consistency. It seems to have been the most frequent focus of support, judging by the number of times teachers mentioned it. Some teachers felt that confidence in judging a pupil's level of work in any area would mainly come with experience, a view well expressed by one teacher who reported that staff in her school had concluded after discussion that only through familiarisation with the guidelines would they become adept at recognising levels. Another teacher (in a different Region) agreed:

> *It's a self-taught thing, so unless you get into the documents you can't do it. You have to experience and teach the strands to come to terms with the levels, I think you have to do it yourself.*

And another thought it essential that teachers should not be entrenched at any one stage but move up and down the stages to experience as many levels as possible.

As headteachers had intimated, cluster (or similar) groups seemed to have been effective in providing materials to aid teachers. Of the two clusters for which we have such detail, one group was working on developing criteria for attributing levels and was preparing assessment sheets; another, after asking that teachers in each associated school set pieces of work and discuss them with their own colleagues before bringing them to the groups, had produced a document on reading levels and a compendium of writing exemplars, as well as materials in mathematics and health.

Overall, then, the data on assessment confirm that schools were slow to begin taking account of the assessment guidelines. At the end of 1993/start of 1994 headteachers and teachers alike tended to feel that they were only at the awareness-raising stage; indeed, a large group of teachers interviewed did not even consider themselves to have begun the process of implementing the guidelines. These data are perhaps related to the further finding that in spring 1994 most of the visit schools did not have a written school policy for assessment. This slow pace of movement, however, did not seem to be driven by a reluctance to put the principles of the assessment guidelines into practice, as on the whole both headteachers and teachers thought of the guidelines as helpful. For headteachers, the main reason for this was that they de-emphasised the summative function of assessment in favour of highlighting its central place in the teaching and learning process, while teachers appreciated the fact that the guidelines made them think more, and more deeply, about assessment issues. However, the delay in implementing the assessment guidelines may be related to a major criticism coming from both headteachers and teachers: the guidelines over-emphasised the keeping of written records, while teachers felt they lacked examples of how assessment 5–14 style was to be done. On a positive note, the data suggest that teachers were making progress towards greater understanding of the 5–14 levels, although it has to be said that this progress was taking place within the limits of mathematics and English language, and teachers' comfort with using the levels was greatest with respect to the levels of work they encountered most often. A number of comments from headteachers and teachers interviewed suggest the possibility that in practice some teachers might be less secure in their understanding of the levels than first appeared; carrying out the process of national testing both revealed discrepancies in teachers' thinking about the levels and helped teachers to understand what they meant. Some kind of organised help in moderation of the levels was reported from most of the

schools visited. Usually this took the form of in-school sessions and was appreciated, although there were suggestions that nothing could match the value of talking concerns over with immediate colleagues.

The new arrangements for national testing

The questionnaire to headteachers of November/December 1993 revealed that of the 140 schools returning information, 44% had undertaken national testing in 1993. (At that time, of course, the school year had not long begun and many schools planned to test in the remaining terms.) Most headteachers, however, gave their views about the new arrangements for testing. Those views are reported below, but in attaching weight to them it should be remembered that fewer than half had based their opinions on actual experience of the testing process. Similarly, only 31% of the teachers offering their views about the new arrangements through the 1993 questionnaires had personal experience of conducting them, while data gathered the following spring suggest that not all teachers on the staff of the 'testing' schools had been involved in that process. Of the 135 teachers interviewed, only 21 claimed to have experience of it.

Headteachers' views

The 1993 questionnaire established that on the whole, and with reservations, most headteachers were satisfied with the new arrangements for national testing. Responses were as follows:

very satisfied	*satisfied on the whole*	*dissatisfied on the whole*	*not at all satisfied*	*no response*
14%	46%	24%	12%	4%

This pattern of a greater likelihood of seeing advantages than disadvantages was echoed in the interviews with headteachers which followed some weeks later, when we also had the opportunity to explore in depth what those advantages and any disadvantages might be. The great majority of headteachers interviewed saw some advantages in the new arrangements, but three could think of none. Many pointed to disadvantages. A few headteachers saw nothing but advantage in the new arrangements and a few nothing but disadvantage, but for most there was a mixture of both. Several headteachers, while acknowledging good points in the new arrangements, stressed that nevertheless they would prefer not to have to conduct national tests at all.

Advantages

The most common advantage that the new testing arrangements were thought to have over the old, by far, was that they were more flexible. In itself, this flexibility brought a variety of advantages, in particular that they put the teacher in control of the timing and level of the tests given. Because of this, teachers were more easily able to build them into the context of classroom work and ensure that children would be less anxious. This was helped by the fact that the tests were thought to be more contextualised than the old ones and more sensible in terms of the resources they required. Because the tests could be used more flexibly under the new arrangements, some headteachers saw them as a useful form of continuous assessment; in this sense they were thought to boost school resources. Other advantages were that under the new arrangements the tests confirmed teachers' judgements and helped them to understand the levels.

Disadvantages

The most commonly voiced disadvantage was mechanistic: a number of headteachers saw difficulties in organising and administering the tests under the new, all-year-round arrangements. Extra time would be needed to organise them and the problems associated with administering the tests were thought to be particularly acute for teaching headteachers. In the words of one such,

> *I know they're meant to be done within the classroom, but so many of them, you have to read them to the children – that's way down the school, the first levels. So to say right, I'm going to do it with two children – well, what do you do with the other twenty that are bobbing about at the same time? I mean, it's different in a school where you've got an assistant head and a headteacher who are non-teaching.*

Another common complaint was that the national tests did no more than confirm teachers' judgements. This told them only what they already knew. They felt this was a waste of time, and would have preferred the tests to be diagnostic to 'open up new avenues'. However, national tests were never intended to act in the latter capacity, and the attitude of these headteachers stands in interesting contrast to the views of many teachers, reported in later paragraphs, who thought the tests would give them a useful backup of their own assessment. Other disadvantages were thought to be that

- the tests were of doubtful validity, being of variable quality
- they would cause feelings of pressure, inadequacy and failure in teachers
- the tests would assume too great an importance and cause teachers both to teach to the test and to give the 'tested' children all their attention
- children who failed the tests would feel inadequate
- teachers had not received enough training and support.

Teachers' views of the new arrangements

Again, we used the 1993 questionnaire to test teachers' opinions of the new arrangements, and again found a picture of overall satisfaction, with reservations. Indeed, slightly more teachers than headteachers felt satisfied:

very satisfied	*satisfied on the whole*	*dissatisfied on the whole*	*not at all satisfied*	*no response*
13%	54%	13%	15%	5%

As we stated earlier, only 31% of these teachers had personal experience of conducting national tests.

Advantages

As with the headteachers, we delved into what the advantages and disadvantages of the new arrangements were thought to be during the spring 1994 interviews. Again, we found that the greatest advantage was flexibility. This drew repeated positive responses, whether or not teachers supported the idea of national tests in principle. In particular it was thought good that children would only be tested when the teacher felt they were ready: this was fairer for the children and meant there was less pressure on them. Equally there was less pressure on teachers to test all children at the same time or (in the case of P4 or P7 teachers) to teach to tests. In addition, satisfaction was expressed that the teacher was now in control of the testing process. Testing was less disruptive and could more easily be integrated into children's daily programmes of work. 'Although I'm still opposed to testing, the flexibility of the new arrangements makes more educational sense,' was one teacher's comment.

The stated purpose of national testing (i.e. the verification of teachers' assessments rather the grading of pupils) was not lost on the many teachers who commented that the tests might serve as a useful back-up of their own assessment, that it should simply be seen as another assessment tool or formal recording method, and indeed that it might even boost the confidence of teachers still ill-at-ease with 5–14 levels. As one teacher explained, 'It confirms your decision, and that's confidence-building when the levels aren't properly understood.'

Disadvantages

Some teachers were unclear as to the purpose of national testing and saw it as futile and time-wasting. 'What's the point if the basic premise is that the teacher knows what level the child has attained?' was a typical remark. Others, believing that a major purpose of the national tests was to verify teachers' judgements, resented the implication that they could not do their job. 'The disadvantages are the same whatever the arrangements,' said one teacher. 'You're testing your own judgement, not the child's ability.'

One teacher expressed her ambiguous feelings about the value of testing as an aid to teachers' assessment:

> *All that time spent – a good bit of time – will it relate favourably to the benefits? I don't know. I hope so, because it's time lost in teaching. I'll be looking for something to verify my assessment, so I'll do the testing. But if I test a child at level B and they achieve it, I'm not sure if I'll feel pleased or think 'I KNOW that – what a lot of time I've wasted testing them!'*

In addition, there was some resentment that even under the revised arrangements national testing was an imposition from above and a number of teachers (most of whom conceded that the new arrangements were an improvement on the old) made clear their opposition to the idea *per se*.

The extra workload and the time taken up in implementing and marking tests (especially if eight units were to be given for each level) was a major cause for concern. Linked to this was a fear that testing would encroach on the classroom curriculum and that teachers would start to 'teach to the tests'. Worry was also expressed that tests would be complicated to administer and manage properly, and there was some resentment of the enhanced role given teachers in assessing when pupils were ready to be tested. One teacher's comment reveals her lack of confidence in using own assessment to judge what level a pupil had reached:

> *The testing assumes all teachers are confident at deciding which level a pupil has attained, and many are not ... Once again, it's the teacher's decision with very little training.*

Confirming this, one deputy headteacher said of her colleagues:

> *Teachers feel uncertain about their judgements, and they feel a responsibility to get their assessments right otherwise the child will have the experience of failing the test.*

The effect of testing on the children was at the forefront of some teachers' objections. It was thought by some that an undesirable 'labelling' of children would ensue, and that even under the new, less formal arrangement testing would cause unnecessary anxiety :

> *There's no good reason to put children through testing in primary school. Even if you give the tests as part of the day's normal programme of work, the children know that they're being tested – one of mine burst into tears.*

Teachers' views of the testing materials

Although the interviews did not probe specifically for opinion about the testing materials, 25 teachers chose to offer comment about them. The materials were both praised and criticised. The two teachers who had used them to test had found them 'user-friendly' and 'far more suitable in terms of resources'; another teacher thought them 'great sources of work' while another 'dislike[d] them as testing material, but love[d] them as teaching material'. The chief criticism made was that the units did not contain enough questions on each subject to assess a child's knowledge properly, and consequently increased the possibility of failure:

> *I was disappointed in the standards of the tests. There are only two questions on each topic. A careless mistake could mean they fail.*

However, this repeated criticism came from teachers who had not yet tested, and all worked within the same Region.

Most people, then, were on the whole satisfied with the new arrangements, seeing them as flexible and giving teachers more control over the testing process. This did not necessarily mean that people felt more warmly about the tests in themselves; many still regarded them as a waste of time as they revealed nothing new about children's progress. A major fear was that it was going to be time-consuming to organise the tests and difficult to put that organisation into practice. To what extent had schools planned their organisation of national tests, and where would the bulk of the work fall?

■ The organisation of national tests

Questionnaire data from headteachers and teachers

The 1993 questionnaire offered both headteachers and classroom teachers possible ways in which national tests could be organised, and asked which was most likely in their schools and classrooms. As Table 3.4 below illustrates, headteachers were clear that classroom teachers would bear the brunt of the work involved in choosing test units, marking tests and recording those marks, and reporting test results to parents. Headteachers were most likely to order test units and check that the necessary resources were in schools.

Table 3.4: Extent of staff involvement in various procedures for national testing
(Source: National survey November/December 1993. N=140)

	Class teacher %	*Head teacher* %	*Promoted staff member* %	*Learning support teacher* %
Choosing test units	92	69	34	41
Ordering test units	25	88	26	7
Checking resources in school	34	75	48	11
Marking tests	97	38	21	18
Recording test marks	89	54	16	11
Reporting test results to parents	85	66	18	20

In addition, the questionnaire returns from teachers reveal that when it came to making decisions about when children would be tested and for what levels, 22% of classroom teachers claimed to do this without assistance. It was more likely that others would be consulted, however, especially the headteacher and learning support teacher:

Table 3.5: Persons class teachers consulted when making decisions about testing
(Source: National survey November/December 1993. N=224)

	When a pupil is ready to test %	*The appropriate level of test* %
head teacher	39	30
learning support teacher	38	35
promoted staff member	30	26
staff with whom I share teaching	30	27
it's my decision alone	22	25
pupils	7	4
parents	5	1

Asked how important a number of given factors would be in making these decisions, classroom teachers replied as follows:

Table 3.6: Important factors in decisions about test levels
(Source: National survey November/December 1993. N=224)

	Very/quite important %	*Limited/no importance* %	*Not applicable/ no response* %
Teacher's everyday knowledge of the pupil	95	1	4
Teacher's ongoing assessment	95	1	4
Results of teacher-constructed tests	78	11	11
Learning support teacher's assessment	70	5	25
Teaching colleagues' assessment	55	14	31
Results of standardised tests	42	26	32
Pupils' views of their attainment	25	39	35
Parents' views of their children's attainment	16	49	35

In addition, the questionnaire returns told us that most headteachers (68%) and classroom teachers (71%) intended that national tests were likely to be carried out on a small group basis.

It is striking that neither of the two last tables shown above yields much evidence of either parents or pupils being drawn into the planning procedure. The marginal role of parents in negotiation on the matter of national testing is confirmed by headteacher responses to a question asking which of a number of listed procedures for giving parents information when their children took national tests were followed. 70% of respondents told us that parents would be told their children had been tested, and would discover the results, through the school reporting system, but relatively small percentages intended to ask for parental agreement to the testing (38%) or even to tell parents beforehand that

testing would take place (36%). However, it is fair to say that relatively high percentages of headteachers made no response to this section of the questionnaire, possibly because they had not reached the stage of being clear enough in their own minds about what they would do to be able to share ideas with us.

The questionnaire responses, though fascinating, give little insight into the thinking behind them. For this we must turn to the interview data.

Interview data from headteachers

Following the rhythm of the project's data collection plans, in the bulk of the visit schools researchers asked questions about the organisation of national tests between January and March 1994. Partly because this was relatively early in the school year, and partly because some schools were following union guidelines which restricted national testing, at that time only five of the visit schools had experience of the testing process. Ten of the remaining schools had not tested and had reached no decisions about how this would be done, but a further nine schools which had not tested were able to outline their plans. The information coming from one school was not clear whether the school had tested or not.

From the data given by the 'tested' schools, it seems clear that classroom teachers took the major decisions related to national testing, thus endorsing the questionnaire findings. Theirs tended to be the responsibility for deciding when a child was ready to be tested and at what level and for choosing the appropriate test, although in one school the senior teacher had responsibility for ordering the test units. Teachers also administered the tests, possibly with help from a learning support teacher, and marked them afterwards. The tests were kept as low-key as possible, being presented as part of classroom work, although one headteacher told us this did not mean that staff kept from the pupils the fact that they were doing national tests. 'The children know anyway,' she said. Reflecting the questionnaire data, the small group approach to testing was most likely to have been adopted.

Various ways in which the results had been reported to parents were described: one school used a special record sheet formatted to be suitable for national test results, another included the results on children's pupil progress records and a third informed parents via the school's usual report system. None of the headteachers whose schools had experience of testing included prior negotiation with parents in their descriptions of the testing process, although this does not mean that no such negotiation took place.

The plans outlined by the nine headteachers whose schools had not tested at the time of the interviews largely reflected the process described above. Classroom teachers would play the major part in deciding when a child was ready to be tested and the appropriate level for the test; tests would be administered to small groups and as far as possible would be low-key and topic-related.

It was clear that in some schools, plans or parts of plans had been thought through in greater detail than in others. In one school, for example, the headteacher described a process of consultation which would take place between a class teacher and 'a designated member of the management team' and which would provide a kind of mock national test procedure. Once the teacher was satisfied that a particular set of children had reached a particular level, the appropriate management team member would supply the teacher with a bank of practice tests covering the attainment targets of each strand. Marks would be recorded. If results were satisfactory and there was evidence that the tested children had reached the level, they would be tested using national test material. In another school, a highly formalised four-stage process through which teachers would decide when a child

was ready to be tested had been worked out. Its stages were to be discussions with the pupil, observation plus the use of the teacher's diary, scrutiny of pupil achievements related to specific assessment tasks and the use of other assessments. In contrast to such specific planning, another headteacher was undecided about how to administer national tests. If her deputy headteacher was free, one option would be to withdraw the children to be tested from class. 'But then again,' the headteacher mused aloud, 'it's ideal that you would give the test in the classroom situation.'

Concerns

The question of how tests were to be administered in the classroom was one of a number of issues causing concern that emerged from the whole set of interviews. One headteacher felt that children who were not being tested would feel 'out of it' and for this reason thought that although only a small group in a class would be tested, the other children should be given tests to do at the same time. She outlined her idea as follows:

> *Dare I say, what will happen is – it's not what's recommended, but what will probably happen is, perhaps those who shouldn't be getting a test may well just get one, to make the management easier. And it's also something that doesn't do them any harm, you know, to get in the way of it, so that they don't feel out of it ... I don't see that it does any harm, if they're doing ones at a level they've already done before, to make up a group or something. It should be just verifying what you did before.*

Another headteacher was concerned about how to manage with the reading tests, as the teacher needed to read so many. What were the other children to do? One solution was to pull in the help of a learning support teacher 'to just hold the fort.'

A different concern was the level of staff anxiety brought about by the need to conduct national tests. One headteacher told us her staff were 'quite wary' both about giving the tests and marking them. There had been no in-service help, yet she felt the staff needed lots of support and guidance. She herself had organised a folder for staff containing examples of tests, and was hoping to find someone who could put together a resource bank, to save teachers some time. However, in another school one teacher's fears had proved worse than the reality: having begun the process, the teacher had reported to the headteacher afterwards 'I don't know what all the fuss was about, it was a doddle.'

Other issues raised in the course of the interviews included the need to make it clear to parents that pupils could not be expected to be tested and to move through a level every year, the question of whether resource limitation in schools would mean that tests requiring only modest resources would be more likely to be used than others, and how to secure moderation with regard to assessing what level a child was at, especially with respect to writing, which was thought to be more dependent on subjective judgement than mathematics.

■ Summary

With respect to teacher assessment, the data confirm that schools were slow to begin taking account of the assessment guidelines. However, on the whole both headteachers and teachers thought the guidelines were helpful; headteachers appreciated their stress on the centrality of assessment to teaching and learning, while teachers thought it valuable that the guidelines made them think more deeply about their own assessment practice. On the other hand, both headteachers and teachers felt the guidelines overemphasised the need for written records and needed to show examples. Teachers seemed to be growing more comfortable with the 5–14 levels applied to mathematics and English language,

although some headteachers wondered if teachers' confidence with the levels might be less great than first appeared. Help with understanding levels was most commonly given at in-school PAT sessions.

With regard to national testing, not all the sample schools had tested in 1993. Experience of testing under the new arrangements was therefore limited. Most people, however, were on the whole satisfied with the new arrangements because they were more flexible and gave teachers more control over the timing, level and organisation of the tests. Organising the tests, the chief burden for which seems likely to be laid on the shoulders of class teachers, was feared to be difficult and time-consuming. In addition, many people, both headteachers and teachers, failed to see value in them as they were thought to do no more than confirm teachers' judgements, while teachers expressed fears that 'teaching to the test' would become common and that the tests would 'label' children. With regard to the test materials themselves, some teachers felt that they did not assess children's knowledge adequately. There was little evidence that negotiation with parents or pupils had taken place or was planned, although the process of conducting national testing was still very much at a formative stage in many schools.

4 A Primary View of Liaison

The issue of how closely and how successfully schools in each sector work with each other is inevitably important in a programme seeking, as does the 5–14 Development Programme, to make progression from step to step, level to level, smooth and continuous. As early as spring 1992, when primary headteachers were first interviewed, hopes that 5–14 would bring this progression about were evident. A strong theme in their responses had been that 5–14 provided a comprehensive map, shared by all primary schools, which would serve as a basis for curriculum planning, and that its step-by-step structure made progression within that structure clear. Further to this belief that a logical progression for pupils was thus mapped out, headteachers also thought the programme would assure greater discussion of the curriculum, particularly between primary and secondary schools, and that because of this, primary-secondary liaison would improve.

The questions we asked about liaison set out to discover how far these beliefs were borne out. In essence, there are four: What strategies for liaison with their secondary colleagues were primary schools involved in? How successful did they feel these strategies were? To what extent did primary teachers and headteachers think that the 5–14 Development Programme was affecting the liaison they had – and overall, how satisfied were they with that liaison?

The data enable us to explore each of these questions with regard to links between primary and secondary schools. In addition, however, we are able to offer some comment on views of the effect of 5–14 on liaison with nursery schools. Although in its strictest sense the Development Programme was designed to address the needs of pupils between five and fourteen years, so that what provision there was for under-fives lay outside our remit, it was clear that children's experiences, and the extent of their development in the years before their fifth birthday, would affect what they would achieve and how quickly they would achieve it in their first year of primary school. In earlier years teachers in P1 had already told us they spent much of their time in finding out what children knew and what they could do, and that the children did not by any means all begin school in the same state of readiness. It therefore seemed sensible to explore, as far as we could, the nature of existing liaison with nursery schools, focusing on the question of whether the 5–14 Development Programme was affecting such liaison in any way.

We begin this section, however, by concentrating on links between primary and secondary schools, and in particular with the first two of our questions: what strategies for such liaison were primary schools and teachers engaged in, and how successful were they?

■ Strategies for liaison with secondary schools

Questionnaire data

The project set up to evaluate 5–14 implementation from the primary perspective had not originally intended to gather information about liaison with secondary schools; at an early juncture it had been agreed that this would be the province of the secondary project. By

the time the decision to explore the primary viewpoint in addition was made, half the data-gathering opportunities offered by the project were over. Our first chance to put specific questions was offered by the questionnaires sent out in autumn of 1993, in which we asked headteachers and teachers to identify some of the strategies they were using in their liaison with secondary schools, and to estimate how successful these were.

Drawing on our knowledge of the schools, and using data gathered earlier in the project by the team at Northern College, we constructed a list of liaison strategies which it seemed reasonable schools might adopt, and for each one asked if the school was involved in such a strategy (in the case of headteachers) or if the respondent was personally involved (in the case of classroom teachers). If so, we asked respondents to gauge that strategy's success, using a 3-point scale. Table 4.1 below shows the percentage of primary schools and classroom teachers involved in each of the strategies, together with estimates of their success given by headteachers and classroom teachers. Strategies are listed in the order of how commonly they were used, at school level.

Table 4.1: Frequency and success of various strategies for liaison with secondary schools
(Source: National survey November/December 1993. N=140 (headteachers) and 224 (classroom teachers))

	Total % of schools (teachers) involved	**% of those HTs (Ts) who thought the strategy was**		
		very successful	***mostly successful***	***not successful***
pupil visits to secondary	96 (35)	77 (71)	23 (28)	0 (1)
discussion with guidance teachers	94 (31)	56 (33)	42 (63)	2 (4)
discussion at 5–14 meetings	93 (26)	50 (25)	45 (63)	5 (12)
discussion with subject teachers	91 (31)	31 (33)	65 (64)	4 (3)
pupils' work to secondary	89 (25)	37 (40)	47 (40)	16 (20)
joint in-service	89 (34)	33 (24)	53 (61)	14 (15)
secondary pupils to primary	85 (20)	63 (37)	34 (57)	3 (6)
team teaching	82 (19)	50 (60)	43 (38)	7 (2)
primary teachers shadowing secondary teachers	81 (12)	33 (37)	60 (33)	7 (30)
secondary material used	80 (15)	31 (47)	53 (41)	16 (12)
link work	44 (16)	34 (39)	59 (50)	7 (11)

It is immediately apparent that the percentages of teachers having involvement with any of these strategies is far lower than those for headteachers. This is understandable as the headteachers were responding for the whole school, which was more likely to be involved in any of the strategies than would an individual teacher. Further analysis of these data determined that class teachers involved with the strategies listed in this question were most likely to teach the P7 stage (354 responses), then after this P6 classes (114 responses). Teachers of other P stages were much less likely to be involved (44 responses).

It is also apparent that while the first ten strategies appeared to be common in at least 80% of schools, that strategy which involves setting up 'link' work, begun in P7 and completed in S1, was far less common, being used in only 44% of the schools to participate in our questionnaire. This is interesting, as when it was used link work appears to have been at least as successful a strategy for liaison as others used far more frequently: 93% of the headteachers whose schools were using it, and 89% of the teachers who had involvement with it, considered it to be working well. Other strategies, though more usual, could be thought less successful – for example, comparatively high percentages of both headteachers and teachers identified the strategies of sending pupils' work to the secondary school and joint in-service as unsuccessful forms of liaison.

When the picture presented by these data is simplified by collapsing the two columns 'very' and 'mostly' successful, it becomes clear that for most strategies there are only slight differences of opinion between headteachers and classroom teachers. There is a notable difference, however, with respect to primary teachers 'shadowing' secondary teachers: headteachers are considerably more likely to think of the strategy as successful than are the staff who have direct experience of it.

Some of the 16 open comments that headteachers supplied in connection with this question demonstrated the existence of a wider range of liaison mechanisms than was included in our list. For example, two headteachers reported that secondary staff had very successfully 'shadowed' primary teachers. This had been thought most appropriate and valuable:

> *[Secondary teachers] have more time to undertake such liaison and those secondary teachers who have made the effort to see primary children in the class situation have reported the experience to be invaluable. They also commented with astonishment on the range and complexity of primary teaching!*

Another headteacher wrote of an interesting variant on the 'shadowing' theme in that her primary teachers had shadowed, not secondary staff, but some of their own former pupils. Two others gave examples of ways in which secondary schools were sharing their facilities. One such sharing took place through a Regional modern languages development scheme whereby one of the secondary school's language teachers would visit the school to teach German to P6 and P7 pupils. The other happened courtesy of secondary school CDT teachers who, released by Standard Grade examinations from some of their teaching commitments, offered their skills to teach CDT to primary children. In addition, the P7 class also made use of the secondary school's Apple computer room and teacher on Monday afternoons.

We found, then, that primary schools were involved in a wide variety of strategies for liaison with secondary schools, most of which were thought, on the whole, to be largely successful. But how far were any of these being affected by the 5–14 Development Programme? In preparation for the data which addresses this question, mention should be made of a liaison mechanism which has not yet entered the discussion: the cluster or liaison group.

■ 5–14 liaison groups

One of the most visible strategies through which 5–14 has attempted to influence liaison between the primary and secondary school sectors has been the setting up of structures to make it easier for representatives of those sectors to meet each other. They bear various names (cluster group, local coordinating team, area group, liaison group, strategy

management group). All, however, bring together representatives from the secondary school and its associated primary schools, while some also involve nursery colleagues.

The information we have on these groups, which was offered spontaneously by people in interview, suggested that the level and extent of representation vary. One group, for example, was made up of the headteachers from each of the primary and secondary schools; another group included representatives from the local nursery school and the secondary school's 5–14 coordinator rather than its headteacher. At operational rather than strategic level, mention was also made of working parties or groups which were also cross-sector and which sometimes, as the example given above illustrates, included a nursery representative.

How widespread, and how successful, were such groups? The data are equivocal. Our questionnaire of autumn 1993 asked headteachers to indicate whether their schools were implementing 5–14 through a cluster group or similar, and further to estimate the success of that group as a mechanism for implementing 5–14. Just under three quarters (72%) of the primary schools were working through such a group. The opinions of the headteachers who had experience of them were almost equally divided between those who thought them largely successful and those who saw more limitations:

very successful	*successful on the whole*	*limited success*	*not successful*
12%	40%	44%	4%

Eighty people took up the open invitation to explain the reasons for their judgements, suggesting that the most common stumbling block to success, raised in this way by 32 headteachers, was the hardship of finding common ground. Within the primary sector alone, there were groups of schools struggling to bring together different philosophies, priorities and paces of working with 5–14. Priorities between primary and secondary sectors were seen as different, and where more than one secondary school was involved in a cluster group, priorities between those schools could also differ. Pity the cluster group trying to find common ground between primary and primary, primary and secondary and between secondary and secondary too. Under such circumstances it is perhaps not surprising that one headteacher commented wryly that his cluster group was 'a bit unwieldy' and had 'a bit of an artificial "common ground".'

However, the same set of open comments included 18 in which respondents had gone out of their way to point out the value of cluster groups. In this respect they were a means of pooling resources so that the burden of development work was shared, and consistency and coherence within that development work was maintained. They led to greater understanding of different perspectives and to 'cross-fertilisation' of good ideas and, especially for headteachers in small rural schools, reduced feelings of isolation, as the following comments illustrate:

> *As [the head of] a one-teacher school, [I feel] it is undesirable to be working through 5–14 on your own. I need the input and discussions with others in a similar situation to feel I am fully understanding the implications.*

> *In a rural community one can feel very alone. It is good to meet with others and share experiences and ideas – and have a common development plan with regard to one area of the 5–14 implementation, e.g. maths.*

As will be seen, some of these themes emerged during more general discussion about liaison, in interviews.

We now move to the issue of how far liaison was being affected by the 5–14 Development Programme itself. Data which address this question were gathered solely through interview.

■ The influence of 5–14 on liaison with secondary schools

Almost all the headteachers interviewed, 21 of the 25, reported some effect of 5–14 on their liaison with secondary schools. For 15 of these the effects were welcome, although three headteachers saw them as a retrograde step and three were ambivalent about their value. P7 teachers echoed this positive view, 14 feeling aware of changes as a result of 5–14 but only one teacher seeing them in a negative light.

Benefits

Headteachers' views

The most common of the welcome effects was that primary schools now had direct contact with secondary schools at department or subject level, rather than simply at the traditional level of guidance and learning support staff. This seems to have opened up new possibilities, and was a result of working parties having been established, usually for mathematics or English. 'The fact that we have working parties [means that] we are talking to every department at cluster level,' explained one headteacher with enthusiasm, and continued,

> *Learning support is now at cluster level – we are even looking at managing learning support throughout the cluster. We meet at least monthly with the rector of the secondary school. The assistant rector and the principal teachers are on working groups. It's very good.*

For some people, simply having a structure through which common issues could be discussed was in itself a bonus which one headteacher saw as being particularly useful once the schools reached the stage of tackling the environmental studies guidelines. And a small number of headteachers suggested that the formal structure had its own spin-off in the form of increasingly friendly relationships between schools, which might share in-service days and amongst which headteachers were now likely to have informal contacts. One headteacher described the secondary school's willingness to help out by making its science laboratories and equipment available for P7 use and by taking away all the school's tables in the summer for cleaning and sanding down.

Such were not the only concrete results of liaison, however. The view was expressed that secondary schools were now more conscious of the need for continuity between the primary and secondary sectors, an opinion borne out by some of the outcomes of liaison cited to us. These included the development of joint assessment procedures and joint recording procedures, an improved transfer system, the introduction of 'link work' in mathematics and English language and, in one school, primary pupils making visits for the first time to the secondary school.

P7 teachers' views

P7 teachers tended to echo headteachers' satisfaction that tangible results had come from liaison, whether in the form of a mathematics scheme now common to P7 and S1, mathematics and language link-over programmes or joint marking codes. Some teachers commented that the school now received more visits from secondary staff, including

specialists who gave help and advice, and others thought the 5–14 had enhanced personal relationships between primary and secondary teachers. In the words of one of these,

> *They regard us much more as equals, not inferiors. They're seeing that we have skills and so respect us more.*

Stumbling blocks

Such benefits had not always come easily, however, and there had been stumbling blocks which both headteachers and teachers identified.

Headteachers' views

The most frequently encountered of these was felt to have been a reluctance on the part of secondary schools, manifest in various ways, to take an active part in liaison. Some headteachers complained that contact did not extend to all departments, perhaps because those departments did not want to cooperate. There was a belief that the secondary school still wanted a 'fresh start', and another that all the effort of liaison went from the primary school to the secondary:

> *They do come occasionally and visit, but we're the ones that have to send work on, we're the ones that have to send all the reports up to them, really. There's not much help back from them.*

Several headteachers recognised, as a fact of life, that secondary schools had other priorities and that as yet 5–14, unlike Standard Grade and the Revised Higher, was not one of them. Indeed, some of the headteachers interviewed pointed out that one of the difficulties in liaising with secondary schools was rooted in those schools' ignorance of the 5–14 guidelines – some of the secondary teachers, for example, believed that pupils ought to be at level E when they arrived at secondary school and 'so many of them did not know any of the details of the levels or strands.'

However, there is evidence that a secondary school's full involvement in the 5–14 Development Programme can create difficulties for primary schools too, if the pace at which the schools want or are able to move is different. In one case, we were told, secondary staff were keen to embrace environmental studies and expressive arts work and had offered to give lessons in the primary school on religious and moral education, art, music, geography and history, and to work on projects which pupils could continue at secondary level. The primary school, however, did not feel ready to move into implementation of those guidelines. In another case the headteacher hints at a little resentment that the secondary school's interest in 5–14 seemed to have developed overnight:

> *I don't think [the headteacher] saw the validity of 5–14 and ... up till last year kept saying his staff had too much to do and weren't really taking it on board. And suddenly I think he realised that he HAS to take it on board, so suddenly we're having liaison, and money put into it. And it was put into expressive arts this year but we [were doing other things by then and] just couldn't really fit in all the things that they were wanting us to do.*

In spite of the perceived value of the cluster groups as a structure for liaison described above, a number of the stumbling blocks identified had to do with them. A small number of headteachers pointed out that while the meetings themselves could be stimulating and interesting, it could be difficult for both secondary and primary staff to find time to report on work done in the clusters and thus spread it beyond the group. Two headteachers, from

the same cluster, felt their group had achieved little of value because it had lacked a sufficiently focused remit from the beginning. One person reflected that in large groups such as that to which his school belonged communication was always hard, while another recalled difficulties in finding meeting times that suited everyone.

In spite of her experience of a cluster group that she felt had been extremely successful in most ways, one headteacher remarked on the problems that arose when primary and secondary staff encountered each other's different ways of thinking:

> *We stumbled over where differentiation should come – we said differentiation should come in the presentation of the task, they said it should come in the acceptance of the outcome. That was a big one and it took a lot of sorting out ... Also, well, we don't think of 'a subject'. Learning support and language and assessment and all that, they all just flow together, whereas when you are talking to secondary people you are talking to departments.*

Inevitably, there were some comments about the time taken up by liaison.

As we indicated earlier, some headteachers claimed that the 5–14 Development Programme had made no difference to the liaison they had with their high schools. One reason given for this was that such liaison had always been of high quality, and changes were an ongoing part of its development. In one school, however, the headteacher perceived the secondary school to be totally without interest in or understanding of 5–14. 'They do not listen and lack an understanding of the levels, which makes communication very difficult,' she said.

P7 teachers' views about stumbling blocks

As was pointed out earlier, almost all the P7 teachers whose views on liaison were canvassed thought that changes had been for the better, a positive stance which perhaps caused them to make light of stumbling blocks. Whether or not that is true, only six of the 14 P7 teachers identified obstacles to liaison with secondary schools.

One of these agreed with the headteacher opinion given earlier that not all secondary staff were 'au fait' with 5–14, and that this had made it difficult to work with them. Another pointed out that visits from secondary staff were sometimes irregular and poorly timed, coming, for example, at the start of a new project or when the primary teacher was especially busy. A third complained of a particularly obstructive individual at one liaison meeting. For the three others, however, the major stumbling block seems to have been finding the time to devote to liaison, whether in the form of discussion with visiting secondary staff or attendance at liaison meetings.

None of the teachers who had seen no effect on liaison with secondary schools as a result of 5–14 was satisfied with this situation. Their liaison was non-existent or minimal and consisted of visits from learning support staff. One school had enjoyed a 2.5 day joint session with secondary staff in the initial stages of 5–14, but this had never been followed up. Interestingly, in the light of headteachers' comments reported earlier, there was a desire for more direct contact with secondary departments, who needed to be made more aware of what was happening in primary schools so that they could provide continuity for the children. Echoing the view that primary and secondary schools had different ways of thinking, one teacher told us she could not see this happening without radical changes in the secondary system:

> *Basically we are child-oriented, and the secondaries are subject-oriented; we adapt our work to the children's needs, they adapt the children to their subject's needs.*

Negative effects

As we indicated earlier, for three of the headteachers interviewed, and one of the classroom teachers, the stumbling blocks were important enough for them not only to be hindrances to implementation, but also to have had negative effects on their relationships with secondary schools. Reasons for this included resentment on the part of primary school staff at the secondary school's lack of interest, which had 'put primary noses out of joint' and meant that most of the work was done at primary level, and a perception that liaison meetings were now almost entirely devoted to administrative and financial affairs such as deciding priorities and budget allocations. This meant that in contrast to the situation prior to 5–14, discussions were very limited:

> A lot of the discussion at liaison meetings now is about 5–14 and funding, claims for budgets by different areas of 5–14. In fact, it's turned over to where it's nearly all that, now. The secondary school has certainly begun to panic ... Before 5–14, I think liaison was better, really, because it involved a lot of other things, whereas now that's all it is. It's very business-like.

As was stated earlier, however, half the headteachers interviewed felt that their liaison with secondary schools had changed for the better, and two of those who were less certain of this anticipated improvements in the future.

■ Overall satisfaction with secondary school liaison

Earlier in this report, we gave an indication of some of the liaison strategies with which primary schools were involved as they developed ways of working more closely with their associated secondary schools, and also an indication of feelings within primary schools about the success of those strategies. Satisfaction with the success of one or two strategies need not lead to satisfaction overall, however, as is hinted at by the interview data which gave glimpses of the contexts in which such strategies were being tried. Taking all this into account, how satisfied did headteachers and those teachers who were involved with liaison feel with what had been achieved? We put this question to headteachers and P7 teachers via the questionnaire. Table 4.2 below shows that a majority of headteachers was satisfied with the extent of secondary school liaison in their schools, as well as its quality.

Table 4.2: Primary headteacher satisfaction with secondary school liaison
Source: National survey November/December 1993. (N=140)

	very satisfied %	*satisfied on the whole – one or two reservations* %	*dissatisfied on the whole – several reservations* %	*very dissatisfied* %	*no response* %
extent	21	54	17	4	4
quality	17	59	14	4	6

Although well over half the headteachers responding were so satisfied, however, it is also true that on both counts about 20%, a fifth of headteachers responding, were not. In other words, headteachers in about 28 schools had more than minor reservations about the success of their links with secondary schools.

P7 teachers were asked a similar, but more simple question: how satisfied are you with the liaison you personally have with the secondary school? Their responses are shown below in Table 4.3.

Table 4.3: P7 teachers' opinions about the success of their liaison with secondary schools
Source: National survey November/December 1993. (N=80)

very satisfied %	*satisfied on the whole – one or two reservations* %	*dissatisfied on the whole – several reservations* %	*very dissatisfied* %
17	59	19	5

In an attempt to explore what some of the reservations might be, we asked headteachers and P7 teachers to indicate how far they agreed with a number of statements that might be made about secondary school liaison. As with those statements described earlier, they derive from data gathered by the secondary project earlier in the evaluation. Although respondents were asked to use a four-point scale, we have collapsed this to two for the sake of clarity.

Table 4.4: Views of liaison with secondary schools
Source: National survey November/December 1993. N =140 (headteachers) and 80 (P7 teachers)

	agree *% HTs* *% Ts*		**disagree** *% HTs* *% Ts*		**no response** *% HTs* *% Ts*	
• I would like primary teachers to have more personal contact with teachers at the secondary school	79	75	15	25	6	–
• Most secondary teachers do not see the transfer information we provide	62	83	21	17	17	–
• The secondary school wants to implement 5–14 at a different pace from us	57	54	27	46	16	–
• I would like clearer guidance about what transfer information the secondary school wants	53	67	39	33	11	–
• There is no feedback from the secondary school about the transfer information we provide	48	63	51	37	1	–
• Using the 'transfer form' as it is now designed saves teachers valuable time	48	62	34	38	18	–
• The constraints of the 'transfer form' mean that the information given is superficial	44	46	48	54	8	–
• The secondary school is not interested in the transfer information we provide	17	31	69	68	14	–

These data make clear the agreement between most headteachers and P7 teachers that more personal contact for teachers with secondary staff would be welcome. There was also close agreement between the majority in both groups that secondary schools wanted to implement 5–14 at a different pace, although in this instance the majority was less strong.

There is, however, a notable divergence of opinion about whether secondary teachers saw the transfer information P7 teachers supplied: over 20% of the teachers were less likely than headteachers to believe they did. It is also interesting that while fewer than half the headteachers agreed that there was no feedback about transfer information from secondary schools, 63% of P7 teachers indicated that there was none; possibly this reflects targeting of whatever feedback is provided to headteachers rather than classroom level, and a failure for it to filter downwards. Complementing these data, however, is the fact that almost 70% of both headteachers and P7 teachers disagreed with the notion that secondary schools were not interested in the information they could provide.

These data, combined with the insights provided by interviews, suggest that although on the whole primary schools were satisfied with the links they currently enjoyed with secondary schools, the two main areas which could benefit from improvement would be the level of contact and the pace and prioritisation of 5–14 implementation. Contact needed to be more curriculum-oriented, through personal discussion for primary staff with subject teachers, and more consultation about the speed and order of implementation was required. Before consultation could be fruitful, however, secondary staff would need a better understanding of 5–14.

The influence of 5–14 on liaison with nursery schools

Twenty-one of the headteachers interviewed, and 21 classroom teachers (not necessarily from the same schools as the corresponding number of headteachers), took the opportunity to respond to the question of whether the Development Programme had brought about changes in their relationships with the nursery schools from which their pupils came. Ten headteachers were convinced such changes had been brought about, and in every case were thought to have been desirable. In seven of these schools the P1 teachers were also aware of changes, six agreeing that they were for the better. The remaining 11 headteachers did not attribute any changes to 5–14.

Benefits

The headteacher view

The good things to come out of a 5–14 influence on liaison were a greater awareness among all staff concerned of the continuity between nursery, primary and secondary schools, the breaking down of barriers and sharing of experience.

Responses suggest that the forms these changes were most likely to take were more frequent opportunities for nursery and primary school staff to meet each other through their attendance at liaison groups or similar meetings, and an increase in the frequency with which primary school staff visited nursery schools. For one school, such visits were an innovation: 'We never did that before, so that is a good thing,' said the headteacher. One of the headteachers whose liaison group included nursery staff was particularly enthusiastic about the nursery contribution, as the following extract from the interview shows:

> *The rector and the depute rector, we discuss 5–14 very much, and the nursery head joins us as well. She has been on the working groups, has been looking at pre-level A, the different skills – she's been smashing in keeping us informed.*

Some headteachers told us that their primary schools now received more written information from the nurseries, while others described examples of link activities – 'little exercises' – which children started while they were in the nursery school and brought with them to the primary. Work such as this, and more visits of primary teachers to the nurseries, were felt to have advantages for the pupils, as they were both strategies which made the

children feel more at home when they reached the primary surroundings, and made their first day easier. According to one headteacher, they also helped nursery and primary schools to be seen as an entity together with the secondary school, and to reduce the notion of the 'fresh start'. 'Continuity is the issue,' she stressed. One headteacher pointed out that liaison now took account of the pre-five programme and curriculum, but did not specify how it did this.

The P1 teacher view of benefits

Asked for their views of the changes in liaison with nursery school, several P1 teachers saw them as beneficial. They saw two advantages in particular. One was that liaison now gave them better prior information about children's behaviour and abilities, which meant they could plan and prepare for the children's entry into P1, avoiding undue repetition of work. They also saw it as important that well thought-out liaison could mean an easier transition for the children – they could, for example, have the chance to meet the P1 teacher or make a visit to the primary school. One P1 teacher described her school's scheme through which P6 children befriended new pupils, and another informed us that nursery staff helped her, the P1 teacher, for the first week of term.

Stumbling blocks to liaison

The headteachers' perspective

Few 'stumbling blocks' were reported, although a few headteachers commented that because the nursery schools had not been working to 5–14 guidelines they were all different in their methods and it was difficult for primary schools to begin work with them. These headteachers appeared to expect that the 5–14 guidelines heralded a similar curriculum for under-fives, and looked forward to its introduction. 'It will hopefully be better when the pre-five programme is introduced', said one. 'At least then we will know where to start from.' As far as the research team is aware, however, no plans for such a curriculum have been drawn up.

Several headteachers reported that 5–14 had not affected their liaison with nursery schools. Most of these were satisfied that the relationships they already had with the nurseries were so close that it would be hard for 5–14 to have any effect, and some pointed out that as there was no local nursery the question had limited relevance. In a similar way the question had little meaning at that time for a headteacher at whose school there were no children that year who had attended the nursery.

A small number of the headteachers, however, were not satisfied and told us they would have liked 5–14 to have improved their links with nursery schools. However, one pointed out how difficult it would be to start from an even basis because 'not every child coming to school has even been to play group'. Another hoped that in the future, because of 5–14, nurseries would provide more detailed information about children's progress, particularly with respect to the mathematics and English language guidelines.

P1 teachers' views

Perhaps because they were closer to classroom effects, slightly more P1 teachers than headteachers identified obstacles to liaison between primary schools and nurseries.

These were of two kinds. The first was that nurseries seldom sent written records about the children. Such information as was received tended to be incomplete and unreliable in that unless it was asked for specifically it might not be given. Against this complaint, however, must be set the opposite opinion that the information nurseries gave about children's abilities was far too detailed in relation to 5–14 strands, and that it would be

better to know whether the children 'had the basics' such as knowing colours and being able to hold a pencil. Teachers could discover the rest for themselves.

A different stumbling block was the difficulty of finding cover for P1 teachers to visit the nurseries. Sometimes visits had to be cancelled. In one school this had led to all the visits being made by the AHT, thus nullifying the advantages for children in that they did not get to meet the P1 teacher.

Only a few of the P1 teachers interviewed voiced ideas about the kinds of changes they would like to see. One was that the primary school should foster liaison with all surrounding nurseries, not simply that which was closest (in this school's case, the nursery was in-school). The other was that nurseries should achieve more pre-A level maths and language work, to build up children's confidence.

■ Summary

Primary schools, then, were involved in a variety of strategies for liaising with secondary schools. The most common of these were pupils visiting the high school and discussion between primary staff, guidance and subject teachers, often at 5–14 meetings. Although most strategies were accorded some degree of success, both headteachers and teachers tended to think of the first of these as particularly useful. The data gathered on the success of cluster groups as mechanism for liaison are equivocal, however, a common obstacle being the disparate backgrounds of all the schools thus brought together; but when the groups achieved success it was through helping schools to share 5–14 development work and maintain its coherence. This brought about greater understanding between staff and reduced feelings of isolation. The main benefit 5–14 had brought to links with secondary schools was that primary school contact with secondary school staff had been established on a more curriculum-oriented level, directly with departments and subject teachers. This had led to various joint schemes of work and increased contact with specialists. Visiting primary schools was thought to have made secondary school staff more appreciative of primary staff skills. On the other hand, the most common obstacle to progress was thought to be secondary schools' reluctance to be involved in liaison, possibly because their attention was given to initiatives other than 5–14, about which many secondary school staff were ignorant. There were also practical problems in that it was hard for teachers to find time to spread the value of cluster group work, or indeed for liaison more generally. A small number of headteachers felt the obstacles were so great as to have adversely affected their relationships with high schools. The broad picture, however, is of primary school staff satisfaction with their links with secondary schools, although contact needed to be more curriculum-oriented and more consultation about the pace and priorities in 5–14 was required.

With respect to liaison with nursery schools, just under half the headteachers interviewed thought 5–14 had brought changes. Benefits were an increased awareness of the continuity between nursery, primary and secondary schools, which came largely from sharing experience through cluster groups or visits made by primary teachers to nursery schools. This sometimes resulted in improved written reports from nurseries to primary schools, as well as forms of link work for pupils. Several P1 teachers echoed these advantages and also thought that well-planned liaison made transition from nursery school easier for children. Obstacles to progress included the variety of working methods used in different nurseries, a perception that the written information nurseries provided could not be relied upon and practical concerns such as the difficulty of finding cover for P1 teachers to make nursery visits.

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5 Managing 5–14

As this section aims to examine how the changes encouraged by the 5–14 Development Programme were actually made to happen in schools, it concentrates on the data collected by questionnaire and interview from the managers themselves, the headteachers. When appropriate, teachers' perceptions of the management of change in their school have also been reported.

As the principal managers of innovation within their schools, headteachers and their views on 5–14 were likely to influence the importance which the Development Programme was accorded in staffrooms and the enthusiasm with which implementation was approached. We start, therefore, by looking at how headteachers viewed 5–14, then move to examine some of the strategies used to advance implementation. Thirdly, we examine the support received by headteachers in deploying these strategies; and finally we present data from the headteachers' own assessment of their management strategies, as well as on satisfaction with implementation in their school.

■ Headteachers' attitudes to 5–14

The first set of interviews, carried out in the spring of 1992, revealed that most of the 24 headteachers we spoke to approved of the 5–14 Development Programme, feeling it would help schools examine current practice, bring about greater discussion of the curriculum (especially across the primary and secondary sectors), identify good practice and provide a sound basis for school development planning. Most had also thought 5–14 was needed in that it provided a welcome structure for teaching, it specified curricular targets and made explicit what was needed in all curricular areas.

However, most headteachers also had reservations about the way that 5–14 had been introduced. These were dominated by a concern that their teaching staff faced a work overload in connection with reading and absorbing the guidelines, and acting upon them. Neither did they think the Development Programme in itself would improve standards of teaching; for that, more specific action would be required. The picture which emerges is of headteachers as willing but cautious agents of change, generally well disposed towards 5–14 and its ethos, but also anxious to buffer their staff against perceived insensitive management at national or regional level. Just how great a task management of 5–14 was would obviously vary from school to school, depending on how innovatory the recommendations made by 5–14 were in relation to each school's current practice.

■ Strategies for managing implementation

Whatever headteachers' personal attitudes towards 5–14, strategies through which change could be effected would need to be put into place. These would include the use of school development plans and school policies relating to 5–14, but also the 5–14 liaison group. Some mention has already been made of this in the previous section on primary and secondary school liaison. Here the focus is on the role of the liaison group as an overall management strategy.

The role of liaison groups

In spring 1992 a small number of headteachers had mentioned the role played by their liaison group in their elaboration of a school plan. A year later, a slightly larger number of respondents cited their group as having helped them implement 5–14. We therefore tried to ascertain from our questionnaire sample in November '93 how significant a role was being played by cluster groups nationally.

72% of responding headteachers confirmed that their schools were involved in such groups. Almost half of these, however, did not consider that their liaison group was a successful mechanism for implementation. An invitation to open comment yielded 78 responses, some of which hinted at personality clashes, while others spoke of logistical/financial difficulties attributable to geographical isolation, and many complained of lack of time or lack of Regional commitment in providing time. By far the most frequent complaint, however, was that clustering schools together was of limited use when each school was working within different circumstances, at a different pace and to a different agenda. There were comments about the 'differences in educational systems and philosophy' between the primary and secondary sectors, of lack of interest from secondary staff, 'varying degrees of commitment to our joint decisions', or else disagreement on pace and priorities (one headteacher remarked that the primary schools were 'light years ahead', but another was unhappy that her associated secondary wished to push on with implementation of the Religious and Moral Education guidelines while the group was still working on mathematics and language).

Lack of synchronisation was not limited to the primary-secondary interface: many headteachers remarked that associated primaries were out-of-step with each other. This was generally seen as inevitable, since schools were 'at differing stages of development, staff and curricular', and, it would appear, rarely working to a shared development plan. Sometimes the difficulties were due to disparities in size:

> *We have joined a cluster group of small schools doing mathematics. We are further along the road than they are and their problems are different from ours, they being 2-teacher schools and we being a 9-teacher school. We hope to cluster with a senior management team of a similar-sized school.*

A particular difficulty for small schools (often lacking the luxury of non-teaching staff) was finding teaching cover to allow attendance at group meetings. This may have been felt to be doubly regrettable since perhaps, as some responses suggested, small schools had most to gain from collaboration: not only to combat feelings of isolation but because it was important that one- or two-teacher schools share and cooperate 'as our time is valuable and this saves reinventing the wheel'. Although involvement in a liaison group could be a very onerous duty for a teaching head, it was thought that considerable benefit would be derived from shared PATs and in-service days in terms of quality of presentation and increased feedback.

Indeed joint in-service training was one of the positive results of clustering mentioned by a handful of headteachers, as was the production of guidance materials and policies by working parties (though the actual usefulness of these materials was sometimes questioned). Overall, though, in spite of the cumbersome nature of the beast, the greatest benefit of cluster groups seemed to be the opportunity for sharing ideas and increasing liaison, in particular breaking the wall of ignorance between primary and secondary sectors. Not everyone matched the litany of praise cited by one headteacher:

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> *It brings other primaries in an area closer together with each other as well as with the secondary. It helps to bring more consistency and coherence throughout all the schools in the group. It has helped to enlighten secondary staff about the work done in primaries. It has assisted the interface with the authority.*

But perhaps the headteachers most satisfied with the role played by their liaison group were those who had been quick to acknowledge the limited use of the device and who had targeted areas of implementation most likely to benefit, as the following comments suggest:

> *We implement 5–14 on an individual school basis as all our needs are different. However we collaborate on a number of issues and have had a lot of success in our efforts. We meet at least once a month and at in-service days.*

> *Greater understanding of differences between secondary, large primary and rural schools has been achieved. All feeder primaries working on marking code in order that there is uniformity in pupils going to secondary.*

> *This group is currently looking at the kind of information which should be sent from primary to secondary and also between primaries. It is hoped that some sort of rationalisation will emerge.*

Headteachers' experiences of liaison groups, therefore, were equivocal: while some undoubtedly found them a helpful and supportive mechanism, enabling the sharing of ideas and the setting up of focused steering groups and working parties, many others found them frustratingly unwieldy and ineffective, demanding 'lots of effort and meeting up for only a small amount of movement'. It may be noteworthy that only two out of twenty-five headteachers interviewed in the spring of 1994, when asked what factors had helped them implement 5–14, thought to mention their liaison groups: they remarked how much they valued being part of a group, as it 'gave an opportunity for teachers to bat ideas off one another and pick up ideas, so that you didn't feel too isolated'; in contrast, a third headteacher cited lack of direction within her liaison group as having hindered progress.

It could be argued that the liaison group initiative could not but be a slow and difficult process in the initial period, given the very real dislocation between the primary and secondary sectors which 5–14 attempts to address, and the long tradition of individuality within the primary sector. Nevertheless the data outlined above suggest that in the perception of some headteachers the educational authorities were failing to provide the resources (in terms of time, guidance and teaching cover, particularly for small schools) necessary to ensure that cluster groups operated to maximum effect, and that headteachers also felt pulled between the conflicting demands of collaboration with associated schools and their own individual pace of implementation as outlined in their school's development plan. There is in one headteacher's comment a tone of frustration and impatience at the lack of consistent strategic guidance:

> *All five primary schools in our cluster were at different levels of curriculum development when 5–14 started, and as each staff was consulted individually individual School Development Plans came into being. It was emphasised at our training that it was the needs of the school in its community which were to be addressed.*

Another headteacher was more matter-of-fact about the limited usefulness of her cluster group:

> *Although the ASG [associated school group] is involved in implementation at various stages, the main thrust is the school development plan which must take priority over what is developed and the pace.*

In our first round of interviews, a small number of headteachers had indicated that their school development plans had been arrived at collaboratively through a cluster group and was thus shared by all their associated primary schools; the question could be asked whether some degree of frustration and conflict might have been avoided had this strategy been more widely deployed.

Role of school development plans in implementation

The introduction of school development plans, though more or less contemporaneous with 5–14, was an initiative independent of the Development Programme. One would have expected headteachers, however, to have seen the elaboration of school plans as a useful device for structuring and pacing implementation of 5–14. How far was this the case?

When we first interviewed headteachers, in spring 1992, most had envisaged the relatively new mechanism of the school development plan as having a part to play in 5–14 implementation. At that time, to some degree development planning was in process in 15 of the 25 schools, the extent of progress ranging from 'back of envelope' ideas to a well-defined and long-term plan.

A year later, all 25 schools had development plans, in the majority of cases still being developed (or, in the case of nominally completed plans, still being modified). Although some headteachers felt they had not made sufficiently speedy progress, about two-thirds of those interviewed were pleased with the progress they had made, expressing satisfaction at having a structured plan which clearly prioritised action and would legitimate the procrastination of certain areas until others had been tackled (in the words of one headteacher, serving to 'throw a ring fence around the school to protect from other pressures', although he himself doubted if in practice such a tactic would succeed).

Our questionnaire surveys confirmed that the picture gained in interview was representative of the national situation. In November 1992 we had found that 62% of the survey schools were developing a school policy for implementing 5–14 (most of them influenced to a large extent by their Region's policy) while 30% claimed to have such a policy already in place. A year later, the ratio was reversed, so that 70% of the 140 headteachers who responded reported having a development plan in place setting out how the school was implementing 5–14, while a further 26% were in the process of elaborating such a plan. The headteachers of 95% of those schools judged that their plan had helped implementation, with 50% saying this help had been considerable. Of 91 headteachers who commented on their judgement, well over half explained that the development plan had helped them pace implementation through focusing on specific prioritised targets. Some of the comments made suggest not only concern for staff morale and well-being, but the difficulties the headteachers were encountering in introducing changes in a way which would not alienate staff:

> *Consideration of achievable targets and the drawing up of a phased development of implementation is a decided advantage in avoiding overload and subsequent burnout.*

> *Has helped to slow down pace of new initiatives – helps calm panic.*

The second most frequent comment was that the development plan had helped staff gain ownership of implementation (and perhaps in the first instance enabled headteachers themselves to feel that the changes envisaged were not merely impositions from higher authority). This may represent an interesting development from our earliest encounter with headteachers, when only three out of the 24 headteachers interviewed had reported

involving staff at all stages of school plan development, and when in most cases the staff involved had been at senior level. Typical comments from the 1993 survey included:

> *It has given us ownership of what we will implement, when and how, with total staff agreement.*

> *It has ensured that the whole staff are consulted and have ownership of priorities.*

One respondent explained that being able to focus on specific areas and match these to resources and time imparted 'a sense of control over the whole process', and it was clear that for many headteachers ownership and control also meant the ability to resist outside pressures on how implementation should proceed, or as one person put it 'to deflect new innovations with confidence'. This was the 'ringfencing' role already expressed six months earlier by some of our interviewee headteachers, and apparently a widely held perception. As one survey respondent wrote:

> *I feel more in control of implementation, having previously felt overwhelmed. If anyone wants something not in the plan, I can show them and ask what should be removed to make way for new initiatives.*

As already mentioned, however, one headteacher interviewed in the spring of 1993 had expressed reservations as to how effective the 'ringfence' would be; these doubts re-emerged in the survey. A small number of headteachers complained that the development plan was not turning out to be the protective device they had envisaged, because pressure continued to be exerted on them by agencies outwith the schools, most notably the Education Authorities and HMI). The following is representative of these comments:

> *We understood that school development planning would address school priorities, and drew up our plans to tackle those areas we felt to be of most importance to the children. We find, however, that national and regional priorities are thrown at us willy-nilly with pressure to address these as well, usually within impossible time limits. It therefore takes a great deal of resolve to stick to the priorities identified at school level as being of most benefit to the pupils' systematic progress.*

One headteacher spoke of things coming 'very dangerously to the point where we're waving a white flag', with all the different initiatives which had been thrust the school's way that year, from devolved management to staff development and appraisal.

This continued to be a complaint in our final round of interviews: some headteachers who had hoped that Regional approval of the school plan (and therefore of the pace of implementation it dictated) would pre-empt criticism by the Inspectorate found they had no such immunity. One spoke of the inhibiting effect of such pressure on her management of change:

> *If someone was to come along and say to me, 'You don't have to be looking at environmental studies, let's just take this year and we will look at language and make sure you have done that,' if I could do that, and manage it, knowing that there is no other pressure around ... the pressure would be off staff as well, and I would be able to put language into practice perfectly or as near as damn it, and then I would move neatly on to maths ... I could take on RE and environmental studies and expressive arts, so long as I knew there wasn't the pressure and the fear of the Inspector walking in and writing a report.*

The Inspectorate's awareness of the multiple demands being made on schools is evident in '5–14: A Practical Guide', which was issued in the spring of 1994 with the express intent of helping 'to put the 5–14 guidelines into practice in a realistic and manageable way'. It stressed that one of the functions of development planning was to help 'manage the pace of change to ensure that developments are firmly established in classroom practice', and recommended that changes 'be introduced at a pace which allows them to be discussed,

developed within the classroom and evaluated by teachers'. The timing of our interviews did not permit us to gauge how far staffs' concerns were allayed by the document, however; indeed, its publication at that time was relatively recent, and not all the staff we interviewed knew of it.

A small number of people commented that the development plan, with its priorities and targets, had facilitated the drawing up of PAT sessions, as it provided 'obvious content' for staff discussion and training. Some responses demonstrated the importance both head and class teachers attached to opportunities for staff discussion, without which there could be no feeling of common purpose or ownership. Indeed, one headteacher in interview made it quite clear that she saw PAT and in-house in-service sessions as the main arm of her strategy for 5–14 implementation. An approach to implementation which stresses ownership and involvement may be necessary if consensus is sought as well as change, but its time implications are considerable, as one headteacher expressed in her written comment about cluster groups:

> *Time just isn't available to fully develop cluster's programme. PAT for this purpose = 26 hours/year and this is insufficient for school's needs, let alone cluster's. For school policies, developments etc. ownership by the whole staff is required but consultation etc* takes much time *if it is to allow actual active participation by teaching staff. To overburden staff with curricular development etc can be to the disadvantage of the teacher's normal duties in effectively teaching his/her class. It is a dilemma which needs to be resolved.*

The concern that implementation by consent was necessarily slower than implementation by dictate resurfaced in our final interviews, when one headteacher expressed the view that the regional advisorate was not taking this sufficiently into account in evaluating the school's development plan and its progress in implementing 5–14. And indeed when we asked headteachers what if anything had hindered their task the most common obstacle cited was lack of time: time for discussion with staff, for drawing up school policies, time to enable working groups to meet and to hold PAT sessions.

Role of school policies in the implementation of 5–14

If school development planning represented a new initiative in schools, the drawing up of policies in itself was nothing new, and one might have expected that the policies which already governed each school's practice would feed into the overarching development plan and be used to clarify the changes in practice sought by 5–14 and to facilitate their implementation. From the start of the evaluation, therefore, we attempted to gauge the role which existing school policies might play in managing 5–14 innovation.

In the spring of 1992 found that a large majority of the headteachers interviewed thought that existing school policies would continue to be important once 5–14 was established in schools, largely because such policies enabled schools to take account of individual and local differences. This in itself suggests an important role for school policies in implementing the Development Programme, yet the picture which emerged from speaking to class teachers was one of inconsistency and confusion: although many policies had been formulated or amended in the course of the preceding two or three years and headteachers claimed they had been arrived at through collaboration between management and staff, teachers were often unaware of whether policies existed and were unclear about what actually constituted a policy.

This may have been attributable to a temporary instability of the time, with school policies in the process of being re-examined and re-drafted in the light of 5–14, and teachers aware that important changes were in the pipeline, but it nevertheless suggests

a gap between the perspectives and intentions of school management and the reality of classroom practice. However important headteachers felt school policies to be, many classroom teachers, it seemed, had no clear idea of the part they were intended to play in their own teaching, and headteachers who considered school policies important would have an uphill task familiarising staff with these policies and elucidating their relationship to both 5–14 and classroom practice.

In the interviews of 1993 we again asked headteachers if school policies would (or would not) continue to be important, and to what extent these policies complemented 5–14. None had changed the views held a year before, most people still believing in the continued relevance of school policies as a mechanism for addressing local school differences. All claimed that 5–14 was exerting an influence on their policies, however, and a fifth acknowledged that their existing policies were out of date and in need of revision to bring them into line with the Development Programme.

Thus our data do not allow us to make significant claims for the effectiveness of existing school policies as conduits for change in school practice, in spite of headteachers' belief in their continued importance. During our period of evaluation, however, new policies were being elaborated by working parties within and between schools (eg through cluster groups). These involved staff not only from senior management but also at unpromoted level, and one of the areas we examined was the way in which headteachers were using their staff in the management of change.

The deployment of staff in implementation

Early in the project we had wondered whether school management structures were changing to take account of the 5–14 Development Programme, and had asked headteachers – first through the 1992 questionnaire then through interviews – whether any staff had been given remits specific to 5–14. Over two-thirds of headteachers who returned the questionnaire said that such remits had indeed been given. This we explored further in interview, asking if specific posts had been created. Most of the headteachers interviewed said no, and explained that they were trying to implement the Development Programme through existing management structures, spreading the tasks among staff in various ways. A small number however, had allocated specific remits for aspects of 5–14, usually to assistant headteachers or other senior staff.

Schools' use of staff to further 5–14 implementation resurfaced in the final round of interviews, when we asked headteachers to enumerate the factors most helpful to them in implementing 5–14. Our chief intention was to find out about the helpfulness of support materials, but a quarter of the headteachers stressed the support they had received from their staff. Several expressed gratitude specifically to their deputes; where the depute posts were non-teaching, this was an important benefit.

> *I think what's got to be said is having a non-teaching deputy who can go into classrooms. I mean, that's got to be a big factor, where you've got someone who is knowledgeable, who works that way [ie in groups] to support class teachers.*

One headteacher, feeling she was hindered by her school's increasing involvement in devolved management, could only see the situation deteriorating as that development forced her assistant to lose two currently available non-teaching days. Comments like these underline how onerous a task faces teaching headteachers or those with no non-teaching senior staff.

Other headteachers praised those members of their staff who were supportive and keen, willing to implement new things and find effective ways of improving what they did. Teachers themselves, in the course of interviews, tended to mention their involvement in working parties (drawing up policies in maths, reading or writing, auditing existing practice, moderating levels) or their attendance at courses (eg in primary science) which then sometimes gave them an advisory responsibility towards their colleagues. By the same token, however, lack of staff cohesion at senior level or of staff goodwill could seriously obstruct progress, as some headteachers remarked in interview. In two schools there had been a rapid turnover of headteachers since 5–14 began, which had created management problems; in another, staff changes had caused a 'hiccup', but the headteacher was confident that eventually the changes would be for the better. In a fourth school, which was small and in danger of closure, morale had been low and the one staff change had been difficult as the headteacher found the new member of staff unhelpful:

> *The new teacher is almost subversive with [her colleague] because she says 'Oh, I don't see the point of that,' and the remaining teacher doesn't need that, she needs – has always needed – to be gently led along and pulled along, but not being told it's not important. And if someone's always sitting saying 'Oh, I wouldnae bother with that' it's really bad for her, because she needs to be told all the time 'This is a good idea!'*

There is little doubt that considerable managerial skills would be called for in trying to bring change in the practice of recalcitrant staff, and in fact a small number of headteachers admitted dissatisfaction with their own managing. Furthermore, not all staff welcomed the added responsibility of shared decision-making: one headteacher remarked that her staff had never before been involved as apart of the development team and did not automatically embrace the new collaborative ethos:

> *They argue that they don't have the time to be involved in decision-making* and *teaching, and they would rather simply be told what to do.*

Certainly, bearing in mind the importance so many headteachers attached to the common ownership of implementation and to change through consensus, the importance of a dynamic coordinated management team, of a willing, flexible staff and of time available for discussion and development cannot be overstated.

■ Supporting the management of change

Help from regional authorities

In the 1992 round of interviews we had found that although all the headteachers felt that 5–14 had substantially increased their workload, the amount of support they had received in preparation for 5–14 had varied considerably. Satisfaction with the support provided was scant, however, and the greatest plea was for more time. In the questionnaire sent out in November that year the vast majority of headteachers identified discussion with colleagues (both through informal conversations and organised meetings) as having been valuable, but only 60% had been supported by Regional advisers or development officers, and in contrast to teachers few had found Regional in-service courses of much use. The impression was almost one of headteachers being left to sink or swim, and mainly reliant on help from supportive staff within their school or from informal contact with other colleagues. Did this situation change for the better as implementation continued apace, in terms of Regional support through courses or materials?

The picture which emerged from our next round of interviews, in spring of 1993, may indicate that the standard of Regional support was improving. At that time, a quarter of the headteachers interviewed praised the courses provided by their Region (in some cases

referring to training attended by their staff rather than by themselves, and all but one within the same Region), although one added the courses were too few and far between and in some cases badly organised. One respondent described the courses he had attended as 'well-intentioned' but unhelpful. There was some praise for materials produced by Regional working parties.

In our final round of interviews a year later, in the spring of 1994, we asked headteachers what they felt had been most helpful in implementing 5–14. As mentioned before, some spoke of the enthusiasm of their staff and several praised their cluster group. Others commented on the helpfulness of Regional in-service courses (such as one which had been run on reading for information), but over a third of those interviewed expressed a need for more in-service training targeted to specific domains. Some people stressed that in order to be valuable any in-service had to be relevant to staff needs, implying a criticism which had emerged in previous data that some courses were inadequately targeted. However, one of the headteachers acknowledged that her staff were not always honest in stating where they needed help. Another interviewee felt that sharing Regionally-based in-service sessions was essential to help schools take a common approach to implementing 5–14.

However, some headteachers, from different Regions, commented specifically on how supportive the Region and its advisers had been. 'The Region is very good, I cannot complain,' said one. 'It does its best in the circumstances.' She blamed the Government for having expectations of schools but not giving them the help they needed. Another, however, found certain of the advisers threatening, and not necessarily helpful:

> *Advisers are all right, but they're as new to it [5–14] as we are. For example, I would like somebody to come in and design and discuss forms, planning forms, and actually sit with us and help us do it, without being threatening. You know, a lot of them are threatening.*

And gaps in the support offered by Regional authorities are suggested by some of the requests made for furthering implementation, such as the need for a contact person who might give practical help, reassurance and advice; for examples of such things as planning and recording sheets; for information about relevant and good published material; and by an expressed wish that the Region take more responsibility for 5–14.

Cuts in planned activity time (PAT) had alarmed some of those interviewed the previous year, although this particular complaint was less strident in 1994.

The value of support materials

Asked what support materials they had found useful, headteachers made mention of documents originating from the Regions and Divisions, from the SCCC, the SOED, the EIS and BP. However, we were unable to compile a list to identify them more closely, as few of the headteachers interviewed could be specific about the title or source of the documentation they had found helpful. Often all the information they could give was a vague reference such as 'The folders on 5–14 assessment, the big folders, they've been very good, I've used them a lot.'

Enough detail was given, however, to enable us to say that several headteachers mentioned helpful Regionally-produced materials, which included mathematics support materials developed by a standing group, mathematics and language planning sheets and a mathematics pupil-profile sheet, packs on religious and moral education, and Regional curriculum guidelines on mathematics and language. Some headteachers referred to

commercially published material, such as that from Oliver and Boyd, Collins and Heinemann. Their schemes were now geared to 5–14, which was very helpful. One headteacher and her staff had taken time to read through new material which included 'the BP box'. Others had appreciated the help of SCCC documentation (including '5–14 English Language Reading and Writing Exemplars' and an EIS/SCCC Equal Opportunities pack), and some stated that SOED material had helped, specifically '5–14: A Practical Guide', the staff development Pack 'Assessment 5–14', 'Using Ethos Indicators in Primary School', and material on anti-bullying. Several headteachers took the opportunity to reiterate their general appreciation of the 5–14 guidelines themselves.

Further help needed

Headteachers' views

In the last round of interviews headteachers were asked what, apart from more time (which we knew from previous years that almost everyone clamoured for), the school needed to take implementation of 5–14 further. Most of the headteachers identified resources of some kind. For some this meant money, one headteacher making it clear she felt that currently primary schools received an unfairly small share of the education budget. Other headteachers were more specific about what they would like the money to buy. Their shopping list included:

- more staff, both teaching and administrative/clerical
- materials, especially for language and mathematics development, for environmental studies and technology
- help with the implications of more recent 5–14 documents.

One of the headteachers, whose school was small, was almost desperate for resources to implement 5–14. She resented what she saw as an expectation that she and her staff personally would provide them:

> *They [Regional advisers] have said 'These are wonderful ideas!' But where on earth do you find some of these listening things? Where do I find the money to buy pictures to tell my pupils about the various artists? There's just no money ... They want you to do all those things, but you have to go out and buy your own tapes of different kinds of music to let the children hear, and so on ... I think what I'm really saying is, maybe the Region should be looking at their resources centre, and really resourcing it on the 5–14. They should be resourcing music, they should be resourcing pictures, and that kind of thing.*

This theme was taken up by another headteacher, again in a small school, who felt very strongly that teachers were heavily subsidising the Development Programme to compensate for inadequate central funding:

> *The primary sector is only still functioning because teachers are putting their hands in their own pockets to a very large extent and plugging the holes in the wall. And that is absolutely true. I mean, most teachers are subsidising the system to the tune of £40 to £50 a month. That is not an unusual amount for a teacher to be spending on bits and pieces for the classroom, because the financial resources just aren't available.*

As already mentioned, several headteachers asked for more in-service, particularly in the areas of

- identifying levels
- how to administer and mark national tests

- environmental studies
- expressive arts
- new technology
- talking and listening
- drawing up school policies, and putting them into practice.

Some of the other things headteachers thought would help are indicative that they were hoping for very real changes in classroom practice:

- classrooms better suited to practical activity
- smaller classes, which were essential for differentiation
- agreement with the secondary school about joint possibilities.

Thus, our data patchily reveal areas where support needs were being met and others where some headteachers felt insufficiently supported in their difficult task.

Classroom teachers' views

Through the survey of 1992 we established that almost all teachers had had opportunities for informal conversations and organised meetings about 5–14 with their colleagues (slightly over half had also attended meetings with teachers from other schools). Almost three-quarters had received advice from their headteacher; only about a third, however, had been given extra time to read, reflect and plan. All these forms of support had been found useful by the vast majority of teachers, in particular the extra time.

The teachers we interviewed in spring of 1994 told us what were the biggest obstacles to their own implementation of 5–14: almost half stressed lack of time, while others identified a lack of resources. There were also some complaints about inadequate guidance. More specifically, the main clamour was for

- further resources, mainly in terms of materials but also of extra staffing and specialist support
- more in-service training, both in-house and regional, mainly (when specified) in the area of environmental studies and also of the expressive arts
- more opportunities to discuss and exchange ideas with own colleagues and with staff from other schools
- specialist help, usually for environmental studies and/or the expressive arts (most of those who requested this worked in the same Region).

It was natural that as implementation proceeded, further needs would arise and have to be addressed, and this was borne out in both questionnaire survey and interview. We took advantage of our last set of interviews to ask headteachers and teachers to look back over the last two years and evaluate their overall progress in implementing 5–14.

Satisfaction with progress

Headteachers' views

Half the headteachers felt on the whole satisfied, with the others evenly divided between those with mixed feelings and those whose responses were dominated by tones of frustration. This profile may, however, suggest a level of dissatisfaction greater than that

experienced nationwide: when asked in autumn/ winter 1993 how satisfied they were overall with their school's progress over the last year, 83% of our 157 headteachers had declared themselves satisfied (including 10% who were very satisfied).

In interview, all those who felt satisfied could point to clear achievements, and in the main the two reasons for satisfaction were:

- positive staff attitudes to, and confidence with, 5–14, in particular maths and language
- the more realistic pace of development.

A few headteachers commented, however, that much work was still needed because although they had achieved as much as they felt they could, the schools had embarked on 5–14 with considerable basic groundwork to do. One of these headteachers pointed to 5–14's promotion of the practical-based classroom: when she had arrived in the school, the prevailing teaching style had just not lent itself to practical activities, and all the staff had had to address that issue before anything more specific to 5–14 could be attempted. Another headteacher reminded us that her school had had to deal with 'some extremely difficult characters' and was 'working against a very deprived socio-economic background'. Nevertheless, she felt the school had achieved what it had set out to achieve.

The headteachers whose feelings were mixed could all identify important areas of progress, but all would have liked to have moved faster. One implied that the school had taken only relatively small steps forward because it was engaged in real rather than 'lip-service' implementation, and one identified an increase in her pupil numbers coupled with loss of her AHT as the cause of a slowing-down. Yet others compared progress in their present school unfavourably with the speed of 5–14 implementation in their previous posts.

A strong sense of frustration ran through the comments of the headteachers who felt dissatisfied and disappointed with the progress made. In most of these schools, staffing problems of various kinds were at the heart of that frustration: inadequate staffing levels, which meant that while the basic things got done the more interesting things had to be pushed aside; staff inability to translate written changes into classroom practice; low staff morale and a general lack of enthusiasm for 5–14; and loss of confidence among good staff. One headteacher's frustration, however, stemmed from the lack of progress made by the Region's working party for language:

> *The maths group has been very good. Eighteen months down the road in language and I am getting the first stuff in now. And what did they produce? Another programme of study. I am not convinced that I needed it.*

Another teacher laid the blame for slow progress on herself:

> *I'm finding my feet here and I'm trying to assess exactly where we are – and perhaps my ideas don't match up to the last headteacher. They [the staff] are watching to see what I'm going to do.*

Classroom teachers' views

As we have seen, the teachers in our 1992 survey had reported a high degree of support within their own school (notwithstanding severe constraints of time). This suggested a degree of satisfaction with the management of 5–14 within the school which was reinforced in the interviews of the following spring. At that time a number of teachers

mentioned the valuable support derived from a supportive atmosphere in school and helpful senior staff: management were praised for making 5–14 less threatening, producing helpful materials and making time for staff discussion. Some teachers had welcomed being forced into looking at 5–14 as this had increased their familiarity and ease with it. Equally, absence of firm direction was mentioned as a hindering progress; the criticism was sometimes directed at Regional authorities, but when it referred to school management, this was attributed to changes in headteacher staffing. By far the biggest complaint was about shortage of time and the rate at which teachers felt they were being expected to deal with the guidelines. As we have seen, this sentiment was shared by many headteachers who were keen to find ways of sheltering their staff from work overload.

Headteachers' approach to implementation, and the repeated emphasis on consultation with staff, would appear to be vindicated by their teachers' evaluation of 5–14 implementation in their school. We knew through the national survey of November 1993 that a quarter of the teachers had found implementation easier than the year before, and a further 41% had found it easier in some ways, harder in others: this was generally explained by increased familiarity with the English and mathematics guidelines coupled with new problems faced in tackling other documents. When we returned to this matter in our final interviews, half the teachers interviewed said they were finding aspects of 5–14 easier to deal with than the previous year. They attributed this mainly to increased familiarity with the guidelines, particularly those for English and mathematics, gained both through practice and in-school work with colleagues at PAT sessions and in-house in-service.

Did those interviewed feel satisfied, overall, with what they had been able to achieve over the last two years? Almost three-quarters told us that, to varying degrees, they did. Again most of the positive comments made reference to growing familiarisation with the guidelines through usage, but some teachers specified their appreciation of how their school had organised 5–14 implementation, providing time for discussion and support for staff collectively as well as individual assistance (one headteacher, for example, had broken down one of the 5–14 documents into areas applicable to each teacher's primary stage). Several teachers cited a slower pace of implementation as a cause of satisfaction. The mastering of one document at a time, they felt, was ensuring more successful implementation.

On the other hand over a fifth of the teachers interviewed were not satisfied with their own achievements, most of these people feeling swamped by the amount of work expected of them. Two comments typify their feelings of frustration, alternately fired with resentment against the pressure on them from above, or revealing a loss of professional confidence and self-esteem:

> *I think it's just over the top and far too much. I feel I can never get to grips with anything: I skim the surface of every area of the curriculum, but I can never go into depth in anything.*

> *I just feel that I've not been able to achieve enough. I feel that there's so much more that I should be doing. I almost feel incompetent, if you like.*

Some comments were implicitly or overtly critical of the management of change within the school. Several teachers criticised the pace of implementation: some of these, although satisfied overall, thought that a slower pace would reduce pressure for the better, while others complained that implementation had been too slow, with too much time spent on

fruitless staff discussion; senior management were blamed for a lack of structure and organisation which made implementation 'scrappy and hard to follow'. Some teachers were critical of the use made of staff development time, and there was a complaint that with a change in the senior management team a source of guidance and support had been lost:

> *We used to work with the previous assistant headteacher in planning. Now I don't get any feedback on the forward plans I submit, and I don't know if I'm doing the right thing.*

Both teachers' and headteachers' feelings of satisfaction with 5–14 implementation in their school would depend not only on how this implementation was being managed, but to a significant extent on the benefits from 5–14 innovations, either expected or already in evidence. As reported in section 2, when we asked headteachers and teachers if they could see benefits to pupils from 5-14 we found that roughly half of each considered that the Development Programme was already contributing improvements to children's learning by offering pupils a broader range of experiences, equipping them with life-enhancing skills and ensuring consistency and progression in their school experience. Such support for the ultimate value of the changes being brought about in schools was qualified, however, by the number of respondents who could discern no benefits to pupils or thought that positive effects were outweighed by negative ones; about a fifth of respondents reserved judgement, thinking it was still too early to tell.

■ Summary

Most headteachers surveyed used their cluster groups as vehicles for implementing change, seeing in them a valuable forum for discussion and exchange of ideas, but there was a widely held perception that individual schools' particular circumstances, priorities and paces of implementation seriously limited the effectiveness of collaborative work. More store was set by school development plans which were generally thought to have aided the introduction and implementation of change by providing foci of development and specifying targets thought achievable by staff, and allowing staff to gain a sense of ownership over the changes being sought. However, such plans were not protecting schools from outside pressure as much as some headteachers had hoped. Our data did not suggest that school policies predating 5–14 were being used as effective devices for changing classroom practice, nor were staff structures significantly changed, although headteachers stressed the importance of supportive staff and of a consensual style of leadership in introducing change.

The degree and perceived usefulness of support from Regional authorities varied. The kinds of help requested by headteachers with taking implementation further included more financial resourcing, extra staffing, more written materials and further training. These needs, in particular for material resources and training, were echoed by classroom teachers.

There was a relatively high degree of satisfaction with the way change had been managed in schools, among both headteachers and their staff. Reasons cited for this included a more realistic (ie slower) pace of development, increased familiarity with the guidelines, and beneficial in-house discussion and developmental work. There was qualified support for the contention that the changes brought about by the 5–14 Programme were in fact improving the quality of children's learning experience.

6 Glenmount

In this case study, the names of the school and the two headteachers involved have been fictionalised. P stage references have systematically been changed.

Background and preliminary arrangements

Glenmount Primary is a relatively large school with about 400 pupils, organised into two classes for each year group. It sits at the middle of a labyrinth of roads which run through an extensive council housing development near the centre of a small town, so that it is close to many of the families whose children attend. The school building, of an architectural style common in the late sixties or early seventies, appears to have worn well with time, and is surrounded by a large tarmac playground augmented with some grass. Inside, the school is low and spacious with long corridors connecting the classrooms. Light enters the main foyer through large plate-glass windows which enable the visitor to see the children's art work, poetry and other creative attempts adorning not only the corridors but also its main wall.

The project's initial telephone contact with Glenmount Primary School had been on the basis of its association with one of the high schools identified in a very early phase of the project as relatively advanced in its thinking about 5–14. As in all 25 of the 'visit' schools taking part in the primary project, it was central to our research method that I interview the headteacher and a teacher from each of the P stages, obtain agreement from two teachers to sit in on their classes so that I might better understand the context of teaching in the school, and obtain copies of any relevant documents the school or its teachers might be producing. I was also interested to attend any meetings to do with 5–14 that might be taking place during my visit.

Although the headteacher at Glenmount, Mrs Rae, was open to the idea, she gave me two warnings. One was that she was due to retire from teaching at the end of school year 1991/2. The other was that her staff were likely to be suspicious of the research, and would need time to think about whether they wanted to be involved. Mrs Rae did not wish to foist the research on them, especially as she personally would only be at the school for a part of it, and asked me visit the school to tell the staff more about the project before a decision was made.

Consequently, I went to Glenmount to explain that the purpose of the study was to find out how 5–14 was being implemented, not to evaluate the effectiveness of the teachers, and to stress that the findings, which would indicate ways in which implementation might be improved, would be fed back to schools as soon as they were available. In this way the staff in the research visit schools would have the opportunity to make their views about implementation and the 5–14 Development Programme known to people who would have some power to act on them.

These points were made to the staff at one of their PAT meetings, in the staff room. In spite of a cheery and enthusiastic introduction from the headteacher, the teachers listened in silence and asked few questions at the end. Afterwards, conversation turned to other matters without any discussion of the project, but as I left with the headteacher the

feedback I received from her was that as there had been no objections, data gathering should go ahead.

Apart from being a chance to explain the research to everyone in the school and try to secure staff goodwill towards it, the visit was also an opportunity to sort out with the headteacher some practical issues relating to the visit week, such as what opportunities there were in the school day for conducting the interviews, where they might take place and who would be interviewed. As there were two teachers at each P stage, there was notionally an element of choice in this, but in practice Mrs Rae made it clear that she had strong preferences for who should participate in the research and who should not. For example, she felt that some of the staff would say so little that there would be no point in my interviewing them; there was a potential difficulty with the interview for one P stage because the person she thought I ought to talk to was ill and likely to be so for a long time, though Mrs Rae hoped he would be back at school by the week we had identified for the visit. She steered me firmly away from the other teacher of this P stage, who was a strong union supporter and held very radical views which she did not think would be helpful. In fact, the teacher we therefore identified for interview was still ill when the visit week took place, so there was no interview for that P stage in that year.

The first year's interviews

The headteacher's reactions to 5–14

During the first interview with Mrs Rae, it became clear that although she thought the 5–14 Development Programme had merit in that it gave a set of clear templates of good practice, its implementation was unlikely to mean much change for her school. She found the guidelines overall helpful, although she wondered if she thought the most successful, those for language and mathematics, were good only because they reflected the school's current practice; in her view they paralleled what her staff were already doing and so she felt empathy with them. In terms of curriculum content, for both language and mathematics she foresaw some changes of emphasis such as greater prominence for listening and talking and problem-solving. However, she did not think that features of the language recommendations such as more attention to editing and redrafting were necessary as the school had already been doing this along the lines suggested in 5–14. As a result, both she and the staff felt happy with the English language guidelines. She was more cautious with respect to the draft guidelines for the other three curriculum areas, however, and had no comment to make on whether changes were likely there.

She saw little need for changes in group work, as ability groups related to the children's different speeds of progress had always been a feature of teaching, and stressed that she had been pleased to see how closely the guidelines correlated with the work currently done. Her feelings of overall satisfaction with the school's current practice in forward planning were also evident. Asked to describe existing practice and the extent of her satisfaction with it, she told me that as staff planned both within a central system and collaboratively – the two teachers at each P stage working closely together – there was coherence across the school, which she found satisfactory. This type of planning would not be affected by the 5–14 Development Programme. Similarly, although the assessment guidelines could help the school to perfect its assessment policy, any changes they would introduce were unlikely to be radical.

She took a relaxed view over pacing implementation, and told me she had tried hard to reassure staff that there was an implementation period of between seven and ten years.

Reassurance of this kind was necessary as the speed at which the documents had arrived in primary schools had been unhelpful, and she stressed that it was important not to ask too much of teachers. In relation to the requirements of the assessment guidelines, for example, her view was that the staff recognised the importance of ongoing assessment and recording and implied that they were already doing the best they could:

> *They recognise the importance of an ongoing assessment programme so that we all know where we are and what we're doing. The need to be able to record what we're assessing is important so that this information can be imparted to the sources that are important.*

On the other hand, Mrs Rae recognised a need to review existing school policies. These would continue to be important even once 5–14 had become established, because they had the flexibility to address local needs, but all those current in the school were old, having been drawn up between 1985 and 1991 in consultation with staff. Policies for assessment, English language, mathematics and environmental studies already existed; she had made a start on reviewing those for assessment and mathematics and had started to think about the implications of the religious and moral education guidelines, whose multicultural emphasis worried her. She had no immediate plans to work on a policy for the expressive arts.

The impression I gained by the end of the interview was that although Mrs Rae welcomed the 5–14 Development Programme generally because it had clear foci set out in an organised way which gave a template for good practice, its implications for changes at Glenmount were slight. Indeed, one of the reasons why she viewed 5–14 so favourably was that it reassured her that the school was doing the right things, and its existing practice with respect to the curriculum, assessment and teaching method required no radical changes. Was there evidence that the staff agreed with this view?

Staff reactions to 5–14

The views of the staff interviewed at Glenmount mirrored those the headteacher had expressed. With few exceptions, most thought that the 5–14 guidelines codified the kinds of practices that were already followed at the school. All had read the mathematics and English language guidelines, and all said that they felt their current teaching closely matched what was being recommended.

Neither set of guidelines was widely used, though more teachers said they used those for language. Only one teacher gave any indication that she had used the mathematics guidelines, and that was for testing, with another teacher, for whether their idea of what level work was at agreed with 5–14. The sorts of changes thought needed for mathematics were minor. For example, the P5 teacher said that it was 'more a case of marrying things up than changing them', and 'making sure you used the right jargon'. The P4 teacher felt that the guidelines must almost have been based on the SPMG scheme, so closely did the two match, though she conceded that perhaps more work on 'maths in a context' was needed.

Three teachers, those of the P3, P4 and P6 classes, told me they used the English language guidelines when they did their forward planning, and the P3 teacher added that she listed targets and ticked them off as they were achieved. The P1, P5 and P3 teachers remarked how much they liked the 'listening' emphasis, awareness of which, the P1 teacher told us, had been raised through a talk given at the school by a BBC representative; the school now had a 'listening post'. The P4 teacher, who was a recent returner to the profession after a break to bring up her family, told me she organised her class with more

language groups than in the past. She welcomed the 5–14 guidelines generally but singled out the creative writing aspect of the language guidelines for especial praise.

The draft guidelines had received relatively little attention. Four teachers had read the religious and moral education draft guidelines, and four the guidelines for environmental studies, but only two had read those for expressive arts and none of the teachers I interviewed had used any of them. As with mathematics and language, all the teachers who had read the draft guidelines were sure that they were already following the recommendations that they made, and anticipated that little change in their current practice would be needed to implement them fully.

Asked if they thought the notion of 'levels' was a useful one, most of the teachers interviewed felt that it had some value – or at least, that it had the potential to be useful once the levels were properly understood. The levels helped teachers to identify aims, said the P2 teacher; the P1 teacher implied that she thought of them as an aid to norm-referenced assessment, telling me that they gave an idea of where pupils were in relation to others so you knew if pupils were progressing. The P4 teacher saw levels as closely related to national testing, which would act as a useful check on the level a pupil was working at.

Some of the views expressed were clearly cautious, however. The P6 teacher stressed that the important thing was that teachers had targets. 5–14 levels would help to even things out for children in transition from one primary school to another, but she added that this aspect of their usefulness was limited as most children were never in that situation. The P3 teacher was very unsure of herself in this discussion, and while not objecting to the notion of levels she thought that teachers had their own clear ideas about where pupils were, thus implying that an external framework was unnecessary. The P5 teacher openly stated her view that the levels would not really be useful. Teachers relied on their own judgements, not those of other teachers, suggesting that whatever level a P1 teacher might state was appropriate for a child moving into P5 , she, the P5 teacher, wanted to make her own decision about it.

Like Mrs Rae, all the teachers thought the 5–14 guidelines generally were good (though hard going because there was little time to read them). They were sensible and straightforward, and full of good ideas, and as such reflected current practice at the school. As with the headteacher, I had the impression that the staff felt quite satisfied with what was already done and that they saw little challenge to established practice in 5–14. However, as some of the teachers had difficulty remembering what the guidelines contained, it was questionable whether they had thought in much depth about their implications. Asked if they thought 5–14 was likely to bring about any changes, good or bad, in their teaching styles or relationship with the children, none could think of changes of this kind, although the P2 and P1 teachers felt that 5–14 might make them more aware of the need to think about what they were trying to achieve.

Such a widespread belief that current practice was in line with the recommendations made in the 5–14 Development Programme suggested that staff would take 5–14 in their stride, and have few concerns about it. That turned out not to be the case. When I asked teachers if the Development Programme had had any impact on their workload and if they felt that enough help with implementing 5–14 had been given, I became aware of an undercurrent of worry. All the teachers said that 5–14 had been an added burden, for two main reasons. Four of the six teachers interviewed stressed that reading the documents had taken up time, and the sense of pressure had been intensified as documents continued

to arrive at the school. Two, however, said that as they were using new weekly planning sheets devised by the assistant headteacher which required them to plan using 5–14 headings, planning took longer. One of these teachers, that for P2, worried that she might not be doing the right thing; the other, the P4 teacher, stressed that the time was consumed by her need to look up each of the headings in the guidelines to see what went under each one. This was made more difficult as she did not have her own copy. The school had received one set of guidelines for each year group, and as there were two teachers to each P stage at Glenmount they had to be shared. She found it unhelpful not to be able to annotate.

We asked if teachers felt they had received enough help to implement 5–14, specifically from the Region, teaching colleagues and the headteacher. There were four comments that the Region had provided quite a lot of courses, though not all of these had been helpful, and four further comments about the helpfulness of discussion with colleagues, all of whom, said one teacher, were quite interested in 5–14.

Opinions about the level of help coming from the headteacher were interesting. Two of the teachers were uneasy at being asked to comment on this and would not, but the other three told me she had not helped them much. 'I don't want to sound disloyal,' said one, 'but she is approaching retirement. I know there is going to be more pressure from the new headteacher to include all strands in our forward planning. Up to now, it's been very much left to us to include as much or as little [from the guidelines] as we want.' She had the sense of having put in a lot of time to read the 5–14 guidelines, but having made little progress. The P1 teacher told me she knew of other schools in which teachers were much further ahead in implementing 5–14 than Glenmount. She felt the school was falling behind. The feeling of pressure she laboured under came, she was sure, from the fact that the headteacher had initiated no activities to help teachers start working with the 5–14 Development Programme.

Such views ran counter to the rather comfortable picture that had been building up, of satisfaction with current practice and certainty that everything that was in the guidelines was being done already in the school. If teachers felt sure that this was the case, there would be no need for them to feel concern, and I wondered if it was possible that the often-reiterated comment of 'It's only what we're doing anyway' was what the teachers were saying amongst themselves, to calm their fears.

Current practice: classroom organisation, differentiation and assessment

Rightly or wrongly, the research team had thought that it would be too early, in 1992, to expect teachers to have considered views about the assessment guidelines. Therefore, as well as asking for their reactions to the curriculum guidelines, we used the first interviews to gather some baseline data about how teachers organised their classes, differentiated work and assessed children's progress.

At Glenmount, I found that all the teachers I interviewed organised their classes into different ability groups for mathematics and language work. All told me they differentiated work by giving different activities to these groups. In addition, they used a variety of other methods involving different expectations of pupils in terms of the outcome, the time the pupil would take and the amount of help she or he would need from the teacher. The P1 teacher added that from time to time she gave diagnostic tests. To assess pupils' progress, all the teachers stressed that they assessed all the time, every day, but that the results of such assessments were not usually recorded. Instead, records existed in the form of the

children's marked work, both in their jotters and in a 'best work' folder (the P3 and P4 teachers) and in the tests associated with the SPMG scheme used in the school. The P1 teacher told me she was worried about the recording aspect of assessment; she did not know what to record or how it should be done. When asked if they involved children in assessing their own work, all the teachers said they did, and described a variety of ways of doing this, which included the teacher asking pupils if they thought the work was the best they could do, encouraging children to offer the teacher comments on their own work and getting the children to mark each other's mental arithmetic and spelling.

Leaving Glenmount at the end of that first week, I had the impression that the school as a whole felt that 5–14 was unlikely to bring changes of any radical nature. The headteacher and her staff said that their current curriculum and ways of teaching were in line with what was being recommended; but some of the teachers' comments about the headteacher's reluctance to engage with 5–14 on the school's behalf led me to wonder how strongly they believed this to be true.

The second year

During the twelve months which followed, Mrs Rae retired and was replaced by Mrs Lowther, with whom I first spoke when I called the school to make arrangements for my second visit. She was very interested in the research and made her pleasure that the school was involved very clear, offering to provide cover for all the interviews. In response to my thanks, she explained that she was glad of the opportunity to go into her teachers' classes without seeming too obviously to be spying on them! With the exception of the P1 teacher who had, unexpectedly, taken early retirement, I was able to interview everyone to whom I had talked in 1992, with the addition of the P7 teacher who had previously been ill. This was fortunate as it helped to maintain the continuity of the project. A change which did not directly affect the continuity of the research but which was likely to affect the school was that the depute headteacher had obtained a new position elsewhere; the replacement teacher had not taken up the responsibility of depute, because Mrs Lowther had asked that the post be non-teaching, and was waiting to hear if her request to the Region would be granted.

The headteacher's views of changes needed

The most important change that Mrs Lowther wanted to bring about in the school was in the teaching methods used. The biggest problem she had in the school, she told me, was that these methods were not in line with the methodology entrenched in 5–14, which pointed to the practical-based classroom. The school had a reputation in the area for giving a good formal education. It had received many placements because of that, because parents liked it. However, she wanted to move school teaching methods away from traditionalism and felt that until staff had changed a little in that respect, it would be difficult to do much else to implement 5–14. A move away from traditionalism would, she hoped, lead to

- a more challenging curriculum
- children who could think and learn independently
- a more motivational learning experience; currently the school was 'jotter bound'
- a high emphasis on a technology programme
- more confident teachers.

The 5–14 initiative offered an opportunity to bring these about.

On a smaller but no less important scale, Mrs Lowther was also keen to make forward planning in the school more centralised. To some extent teachers already collaborated when planning. 'They do plan in stages,' she said. 'With this being a two-stream school, they like to sit and bat ideas off one another, and they often do their planning together.' However, she envisioned a planning system in which staff would relate the activities and skills development they planned to 5–14 outcomes. She favoured something brief to help them do this and told me that the forward planning sheets the staff were currently using were ten years old and inappropriate for 5–14; she hoped the cluster group which had set up working groups for language and mathematics would produce something helpful.

She also saw need for some means of passing more formal information about pupils from teacher to teacher, and was considering the use of pupil profiles.

How was she bringing these changes about?

To help staff start to think in terms of a different teaching methodology, Mrs Lowther saw it as vital that staff were sure of her support. The teachers knew they would have to change, and she thought a lot of them wanted to, but she had needed to spend the first few months of her headship in gaining their trust. 'I hope I'm building up some kind of relationship, some trust,' she said, 'and they know that I won't ask them to change without giving them the support and the help and the resources that they need.'

She believed that to get children moving towards practical-based activity in the classroom a lot of this and other kinds of support would be needed. In this, co-operative teaching was very important, and she had started by making changes in the way the learning support teacher worked so that there was more team and collaborative teaching. The opportunity of working with the learning support teacher in this way had been first offered to those she thought 'would be willing to give it a try' and word had got round the staff room that 'it really was quite good to have someone in your classroom helping with project work, topic work, working with children of all ability ranges.' Although they had been suspicious at first, she thought that now there were at least some staff who enjoyed it; she hoped that as hostility to the idea dissipated this could be a start in breaking down the barriers to a changed methodology. In her own words,

> *The majority of staff have been very helpful and have now started to enjoy the experience of co-operative teaching, team teaching. But there was a – a SILENCE when I first said it, because they hadn't been used to sharing a classroom with anyone. And I made it obvious to them that this was not [for] discussion, I wanted this to happen.*

However, there remained 'a lot of older members of staff who still find it difficult to let go of a class.'

Accompanying this major change there were others. For instance, she had firmed up the remits of the senior staff so that each had responsibility for a particular curriculum area. Previously, they had dealt with jobs as they arose; now they had ongoing responsibility for monitoring resources, and had already conducted a resources audit at her request. She was also conducting an audit of staff development needs, with the intention of starting to work on a school development plan, matched to the pace of the Region's plans for 5–14. Although I knew that the previous headteacher, Mrs Rae, had begun to think along similar lines with regard to staff development planning, Mrs Lowther knew nothing of her predecessor's ideas; presumably they had not passed beyond the thinking stage. And she

had begun to review the old school policies to bring them into line with 5–14, starting with a policy for language. However, again she stressed that simply having a policy was not the important thing. What did matter was making the changes in the school that would enable it to be put into practice. She intended to involve staff in the policy-making process because policy making and practice had to go together. 'To put the policy into practice is going to take a lot more doing in this school, because it's very formal and traditional,' she commented.

Asked how satisfied she felt with progress to date, Mrs Lowther paused to think. On the whole, she did feel satisfaction, because there had been a long way to go, but sometimes when she looked back on her time at the school and asked herself what she had done, it didn't look very much – all she'd done was absorb information. But perhaps that was coming quite far. She hoped she would be able to pass on her own enthusiasm and desire for change to her management team.

What had helped the school progress?

Asked what had been helpful in furthering implementation of 5–14, Mrs Lowther cited five factors:

- the cluster group network
- the Region's impressive phasing for 5–14
- the physical proximity of the high school
- her own enthusiasm
- her confidence to challenge the Authority when she felt it was needed.

Within the cluster, the working groups for language and mathematics had been marvellous for the teachers who served on them:

> *The staff who are taking part in the working groups are discovering what's going on in other schools. They're identifying good practice and they're listening to their colleagues, finding out that their problems are the same problems and finding some ideas for improving.*

The fact that there was a Regional plan which took account of 5–14 meant that there had been some very useful in-service sessions for headteachers, and the phasing of 5–14 implementation enabled her to plan ahead for things like PAT time. She expressed her appreciation clearly:

> *I'm quite impressed that they [the Region] are doing it in phases like that, so that the headteachers know where they're going and where the staff are going so that we can plan for PAT. Because [this] is the Region's development plan, and there's no going against it unless you're feeling very confident.*

With respect to the value of her own enthusiasm, she told us,

> *I don't want the guidelines to be seen as prescriptive and ... because of my own commitment to the type of learning that they're trying to encourage in primary schools, I want to make sure that they are seen as being flexible and that staff realise they are a platform only. And I think that just my own commitment to that style of education, more than anything, has helped me implement them, because all it does is reinforce what I believe is good practice anyway.*

What had held the school back?

Too little time for staff development had applied a strong brake on the speed with which Mrs Lowther had been able to move the staff towards non-traditional teaching approaches

and hence bring them into line with what she saw as the main thrust of 5–14. The lack of time was compounded by the fact that she was unable to buy the help of any outside agencies which came to her notice as potentially helpful; such money as was available for support was allocated to the advisory service and could not be spent in any other way. For example, if she heard that a college of education was running an in-service on a topic she was especially interested in, she could not buy into it.

The only other factor Mrs Lowther identified as having held progress back was the isolation which pertained to all primary schools in which there were no mechanisms for sharing good practice or for reassuring and motivating teachers. The cluster group had gone a long way towards addressing that problem, however.

Mrs Lowther, then, had not shared the view of the previous headteacher that most of what the school did was in line with what was recommended for 5–14 and that few radical changes were needed. On the contrary, she felt that the task of implementing 5–14 that lay ahead of her could not really begin until the teaching methods used in the school were changed drastically. She was very aware that the staff would need a lot of help and support to do this, and that they could not be rushed, but felt she had been able to make a start by introducing the concept of team teaching and nudging, rather than driving, the staff on.

Staff views of their progress

Views and use of the guidelines

An additional year's experience of 5–14 had caused none of the teachers I had previously interviewed to change the way they thought about the guidelines, although two people told me they now felt more aware of the need to check whether they were covering what the guidelines for mathematics and language suggested. The P4 teacher's opinion that the mathematics guidelines were almost based on the SPMG scheme had been strengthened by an in-service day she had attended at which all the people there had decided that SPMG fitted 5–14 very well. 'It was as if 5–14 had been based on primary level 3 SPMG. It was almost exactly all level C, with a few exceptions,' she said. Both of the two teachers new to our project approved of the 5–14 guidelines, and for the same reasons that the other teachers had approved of them: they reflected existing practice, especially, the P7 teacher added, her own emphasis on practical activity. She felt that the mathematics guidelines had contained some thought-provoking ideas which had to some extent changed her views about teaching mathematics – she now tried to make sure that when the children were sitting in groups, they worked together more collaboratively. Mathematics and language were still the only curriculum areas that all the teachers had given attention to (at this stage the documents for expressive arts, religious and moral education and environmental studies were still drafts).

Five people told me they used the curriculum guidelines more this year than last, referring to them more frequently when planning. While the P5 teacher claimed she felt more comfortable with the mathematics guidelines, her colleagues in P3 and P4 had used the language document most. The P3 teacher told me she still used the old planning format, but nevertheless made sure that all the strands were covered. Interestingly, the P4 teacher had also decided to plan her environmental studies work according to 5–14, her interest having been fired by an in-service course she had attended. Using the guidelines in planning would not, however, necessarily mean that changes would be made: although she planned everything against 5–14, the P6 teacher told me the guidelines had little effect on either her mathematics or language work. She had tried introducing more discussion which offered an opportunity to cut down on her marking load, but was wary of it as she

felt it gave lazy children an opt-out – it didn't make them accountable in the way that written work did. In any case, she had also found it was not easy to get the children to talk:

> *Even when we go over work, with reading, there are some children that have got to be pressurised and pressurised ... and it gets to the stage where they just completely clam up. So there's no point.*

The P1 teacher implied she had not thought it necessary to use the 5–14 guidelines at all. There had been only a few discrepancies between 5–14 and SPMG; for example, 5–14 required teachers to 'go into halves' in greater depth and she had worked through the document to identify these discrepancies. Once that had been done, she felt little need of the guidelines. She pointed out that she had been teaching for twenty years, and felt she had enough experience not to need guidelines that had really only 'written down almost everything I used to do.' If teachers followed SPMG they would be following 5–14; if not, it might be different.

All the teachers interviewed had at least a passing acquaintance with the guidelines for assessment. They had been read 'superficially', been 'skimmed through' and read 'so long ago that I can't remember anything about them'. These guidelines, directly, had not led any of the teachers to introduce changes in the way they assessed children's progress in the classroom, although the P6 teacher, who had recently been on a course with an assessment focus, told me that she had heard some interesting ideas about pupil self-assessment there. One of them had been to have a hang-up bag into which children would put what they considered to be their best work. The children had liked it – 'they are very desperate to put in the whole page' – but she felt they sometimes made choices that did not show their progress to best advantage. For example, the children were likely to choose work which had received good marks but which had not stretched them, rather than work in which the marks had not been so good but which had been really challenging. Because of this, the teacher told us, 'I've got to help them to assess what's really worth putting in.'

The teachers' comments suggested that in the past year there had been no whole-school moves towards using any of the guidelines, whether curriculum or assessment; the P5 teacher had remarked that there was no outside pressure to plan to the curriculum, but she had chosen to do that for herself. And although I had been told in 1992 that the assistant headteacher had devised new planning formats, not all staff seemed to be aware of them, and Mrs Lowther's reference to forward planning sheets that were ten years old suggested that she knew of nothing more recent. Perhaps only those staff who worked closely with the assistant headteacher had tried the new sheets out.

Even though five of the teachers referred to the 5–14 guidelines when preparing their forward plans, only the P6 teacher said she planned to 5–14 targets. The other teachers used their own, the P4 teacher supposing that as all the work done related to 5–14 the targets had to be 5–14 targets. Such data suggested a limited use of the 5–14 curriculum framework and lead to questions of how much deeper the preparation of forward plans according to the 5–14 went beyond 'making sure you used the right jargon', as the P5 teacher had put it the year before.

All in all, the progress teachers had made at Glenmount in implementing 5–14 seemed to have been limited. I had the impression that teachers had made little advance beyond a greater awareness that 5–14 was important, and making more frequent reference to the 5–14 strands when they prepared their forward plans. If I were right, it would not have been surprising, as the school had been in a state of transition as Mrs Rae retired and Mrs Lowther arrived. Did the teachers sense that anything had been holding them back?

Had anything hindered teachers from implementing 5–14?

The data suggest they did. Five of the seven teachers told me that the fact that Mrs Rae had been about to retire had blocked implementation of the Development Programme from the start. To use the wording of the P1 teacher, because she had been anticipating retirement Mrs Rae had been 'holding off 5–14' so that the school 'never went overboard' with implementing it. The P5 view was that the school had suffered from the lack of a staff focus for implementation, with the result that in Mrs Rae's time staff had 'paid lip service to 5–14' – if anything had been done, it had been on people's own initiative. Things would be different now. The P3 teacher told me she looked forward to the changes and hoped that the school would set up working parties for 5–14; she was sure the new headteacher would give a sense of direction. Among these teachers, there was a sense of optimism that school management would now have different policies and attitudes that would help staff progress.

Although a lack of leadership was most frequently thought of as the main obstacle to implementing 5–14, others were mentioned: some poor in-service days, lack of time, lack of resources. In the words of the P7 teacher, the latter was 'always a problem'. Inspired by her attendance on an orienteering course, she had planned to take her class out and had telephoned three times to the resources centre to get maps and compasses, but without success. The P4 teacher told me it was impossible to teach science as 5–14 recommended without the appropriate equipment, and taking pupils on trips to tie in with environmental studies work was difficult as money was simply not available. 'A bus to the arts centre costs £55,' she said. 'I've got to raise that money somehow. If every class wants £55, it's got to come from somewhere.'

Had anything helped?

Neither the P2 nor P5 teacher could think of anything that had helped them implement 5–14, but both were confident that now the new headteacher had arrived, support would be there and that things would be different in a year's time, when I next visited. The other teachers all mentioned having attended good in-service courses, especially for language and mathematics in a context. Asked what had made them so good, two teachers (those of P3 and P6) stressed that the courses had given practical advice and furnished them with ideas they could try with their classes. Going to such courses 'gives you good ideas, practical ideas, and you put them into practice and see if they work, rather than just reading from the actual documents', the P6 teacher explained. 'That's been a great help.' They had found it helpful simply to meet teachers from other schools, which had encouraged them as they realised their school was not so far behind as they believed – an interesting shift from their previous view that everything done in language and mathematics was in line with what 5–14 required, so that little change was needed.

The impression I had as I left Glenmount at the end of the second visit was that although evidence of progress in terms of actual change and things having been done was slight, teachers had begun to look differently at their existing practice and had started to think that 5–14 might, after all, be asking for something different. Their confidence in their own judgements of what 5–14 asked seemed shaky, and perhaps because of this they looked forward to Mrs Lowther's giving a sense of direction through creating a whole-school approach to implementing the Development Programme. I felt that one or two of the teachers I had interviewed were likely to resist change, however; they seemed to believe that their current practice, which had evolved with them over their years in teaching, was the best, and they appeared unwilling to see benefit in new ideas.

The last year

In the twelve months which followed, there were staff changes which Mrs Lowther told me about when I called to finalise arrangements for the last school visit. She was in good spirits as her long-promised non-teaching depute was now working in the school and, she assured me, that alone was making a huge difference to the progress she felt was being made. It also made it easier for her to provide cover for the interviews. Changes that would affect the research were that the previous P6 teacher had taken early retirement and been replaced with a probationer, and that the teacher I had interviewed last year as a representative of the P3 stage had changed stages and moved to teach a P1 class, while the 'new' P3 teacher was one who had not previously taken part in the project. A further discontinuity in the data came from an inter-project agreement that as another researcher as well as me needed to gather data from the P5 and P6 teachers in the school, those teachers would not be asked to participate in two interviews. Data for the primary curriculum and assessment project in the final year of school visits would come, then, not from seven P stage teachers but five, and only two of these had been interviewed before: the P2 teacher and the teacher who now taught a P1 class.

The interviews in 1994 offered a final opportunity to talk to the staff in the visit schools about their experience of implementing 5–14. For this reason the research team decided it was important not only to ask for an update on the progress that had been made since the last set of visits, but also to encourage staff to reflect on their satisfaction with what had been achieved over the past two years. We also wanted them to look forward: over the next three years, what more did they want to see happen?

First, however, came questions to do with progress in implementing specific curriculum guidelines. In 1993, most of the teachers at Glenmount had limited their exploration of these to those for mathematics and English language, and many had been ambivalent about what using the guidelines meant in terms of making changes to their existing classroom practice. Had this situation changed in the year that had gone by? Was there more evidence than before of changes in practice? There were questions to be asked, too, about the guidelines for environmental studies, which had been published since the last set of interviews. What did staff at Glenmount think of them? And had any progress been made in assessment?

An update on progress

The headteacher's perspective

In English language, Mrs Lowther felt that in the past year the school had made considerable progress. When asked to choose from a set of four statements which described the stages a school might be at in implementing each of the guidelines ('not begun', 'awareness-raising', 'at the start of formal implementation' and 'well under way') for the English language guidelines she chose 'well under way', explaining that she and the staff had worked really hard together to formulate a school policy. Everyone had felt involved in the process of drawing it up, and as a result it was a policy that everyone agreed with.

Progress in mathematics, however, was not so far forward, being only at 'the start of formal implementation'. However, Mrs Lowther hoped that a school policy would be complete by October. She and the staff had spent time together examining these guidelines, trying to identify areas covered by both the SPMG scheme and the 5–14 document, as well as areas which although featuring in the SPMG scheme, were not in the 5–14 guidelines. However, she knew there was a long way to go. Some of the teachers'

forward plans showed that staff were 'still too much scheme-oriented, on a daily basis, rather than looking at contexts, concepts.' Realising this, Mrs Lowther had been trying to introduce staff to the idea of teaching mathematics through a topic, using mini-topics 'just really for the staff benefit, to let them see it could be done.' It also seemed to be hard for staff to accept some of the ideas in 5–14. On some of the forward plans she had needed 'to write that teachers no longer need to do vulgar fractions at level D ... They're still working through the maths scheme rather than 5–14 maths.'

She also told me that the traditional approach taken to teaching mathematics by many staff in the past meant that there was also a lot of resource-building to do in the school. 'We're looking towards getting away very much from the idea that when they [the children] get to Primary 3 or 4 they shouldn't be using concrete materials, for example,' she said, and continued,

> *I've had quite a hard battle to say to them that children right through the school need concrete materials, and there shouldn't be any stigmas attached to it, and if they feel they need it they should have it ... If they don't know their tables they should have access to their tables, they should be able to go and look the answer up.*

There had been no progress, at least on a school-wide basis, in relation to the religious and moral education guidelines. Nor had there been progress in implementing the guidelines in expressive arts, partly because the Region was not yet ready to support schools in this area. However, Mrs Lowther's comments about the value of specialist input suggested that visiting specialists were playing an important part in bringing 5–14 ideas into classrooms:

> *As a result of 5–14, all these specialists are working much more closely with the class teacher, and planning their work through some kind of 5–14 format, and the plans they give in to me, for the work that they're going to be doing, is all integrated into the class teacher's work and the document. They are referring all the time to the document ... They are well ahead of teachers when it comes to the expressive arts document, I would say.*

This was true for music, art and PE. However, Mrs Lowther was concerned about the lack of specialist input from the Region for teaching drama, and saw it as a future problem.

We asked headteachers what their reactions were to the recently-published environmental studies guidelines – and how helpful they thought they would be to their teachers. Mrs Lowther's response was that 'with time, and a lot of support' teachers would find them very useful. At first, though, the staff would find these guidelines threatening because they forced them to tackle areas they had not had to face before, like information technology and some aspects of science, especially things like sequencing and investigations. Many of the teachers 'paid lip service' to science, she told me, because 'there's not enough breadth of knowledge there for them to feel confident when it comes to imparting it.' She did not believe this problem was peculiar to science:

> *They've found areas of maths and language too that they feel threatened by, because they know that the same weighting hasn't been given to them in the past and that they're going to have to address that problem ... [With science] they're very good at the biology side of it but when it comes to the more basic science side, and sequencing and investigating and problem-solving, then just the same as they did for the maths they're going to have to find some way of building their confidence.*

The school had not addressed the environmental studies guidelines as a staff initiative, though she hoped it would be possible to turn attention to it the following school session. Meanwhile she personally had created a planning proforma, with the strands and levels on it, which staff were free to use or not as they chose. She believed that many had chosen

to use it because they wanted to make themselves familiar with the language of the this document.

With respect to the curriculum, then, activity in the school was still focused on English language and mathematics. Turning the conversation to assessment issues, I asked what kind of progress had been made in putting the assessment guidelines into practice. Was there now an up-to-date school policy? No, there was not. Mrs Lowther felt that the teachers as a group were so out of step with 5–14 in the way they conceptualised assessment that much groundwork was needed before she could claim they were implementing the guidelines in classrooms: a central difficulty was to convince the teachers that it was important to build assessment in right from the planning stage, because they were accustomed to think of it as something that was done at the end. The school had spent a half-day the previous week looking at assessment and what it meant, during which discussion the depute who had been leading it had realised that most staff didn't understand it. 'My depute was absolutely horrified to discover that most them don't really understand what we're talking about,' Mrs Lowther told me, and continued,

> *In actual fact one of [the staff] came and apologised, because she said she'd been teaching for a number of years and she didn't realise how ignorant she was about assessment ... We're looking at all different methods of assessment, just trying to show variety and trying actually to convince them that they did a lot of it already, but that they didn't think of it as assessment.*

So there had been 'a lot of thinking and planning' but no early possibility of real progress in assessment.

Mrs Lowther felt that the best way to change the way the teachers thought about assessment was by example: for she and the depute headteacher to go into classrooms and demonstrate that assessment could be done by 'asking the children what do they think of that piece of work, by discussing with them, by taking children and marking together.' The point of all this work was to 'get them away from the whole idea that assessment is only teacher, the teacher assessing the pupils, and that the only kind of assessment they can do is by a red pen.'

Because of these difficulties, at the moment Mrs Lowther did not feel that the assessment guidelines meant much to most of her staff, and implied that at that stage it would be fruitless for the school to spend a lot of time trying to use them to build a school policy. 'I think a lot of them will read the document the first time, then put it down still not knowing a thing about it,' she said. The teachers would find the guidelines particularly difficult because they looked 'not sharp': unlike the English language and mathematics guidelines the document did not say 'you do this and you do this.' While she felt it was one of the document's strengths that it did not prescribe activity through a tight structure, she herself had needed a long time to work through it, and well understood how difficult her staff would think it was. However, she hoped that although the school was not yet ready to draw up its policy for assessment, the approach she and the depute were taking, of going into classrooms and showing how it could be done, would mean that the whole ethos of assessment would slowly change.

In keeping with their general confusion about assessment, Mrs Lowther suspected that the staff were not very confident in their use of levels. When I asked how far she felt staff were likely to be in agreement with each other in their recognition of work at particular levels, her response implied that agreement was unlikely because the staff still did not work as a team. Part of the difficulty was, as she had said before, that the teachers were 'bogged down' with the idea that assessment was a written test. A lot of staff development would be needed before that would change.

Overall, Mrs Lowther's experience of working to put the 5–14 Development Programme into practice suggested that the process was taking considerable time. Most of the overt progress had been with the guidelines for English language and mathematics, but I had the impression that the effort necessary to make that progress had left little opportunity for the school as a whole to venture into other areas. It was clear that Mrs Lowther felt it would be pointless to create a school policy for assessment because the staff would be unable to participate in the process of drawing it up. Her reply to the question of how satisfied she felt with what the school had been able to achieve in implementing 5–14 over the past two years illustrates clearly how far behind she believed the staff to have been; however, it also suggests her belief that progress in implementing 5–14 can be measured in terms other than direct response to specific guidelines:

> *I felt, in implementing 5–14 in this school, I had to start with the methodology, because the 5–14 guidelines asked for a much more practical-based classroom than has been in the past, and teachers that weren't used to working in that way neeaed a lot of support in their methodology before they could take on board implementing 5–14 ... There was nothing to do with classroom practice [in the 5–14], it was purely curriculum, so we had to address that problem first before we could even start on 5–14.*

What had helped the headteacher, and what had held her back?

As in the previous year, we asked headteachers what had helped them implement 5–14 and what, if anything, had held them back. For Mrs Lowther, all the things that had helped had been to do with people. The most helpful of all had been having a non-teaching depute, who could support staff in classrooms. 'That's got to be a big factor,' she said, 'where you've got someone who is knowledgeable, who works that way, who can support class teachers.' However, she also added that the cluster groups had provided useful opportunities for teachers to meet, bat ideas off one another and pick up ideas so that they and the school felt less isolated; and she very much valued the fact that some of the staff had encouraged her by being keen to implement things and find better ways of doing them.

Less helpful factors had been practical in nature: the fact that there had been no Regional in-service courses in new technology for teachers, the financial implications when she looked at the resources the school needed, the constraints of classrooms which gave little space for practical activity in a class of 33 children and, inevitably, not enough time for discussion and consultation with staff.

Future goals

Projecting her thinking into the future, Mrs Lowther identified three areas in which she hoped for further progress. First among them was her hope that in three years' time staff would have confidence in implementing all areas of 5–14. Importantly, she also wanted to think that by then parents would have been educated into thinking in the way of the 5–14 Development Programme, and would understand it better. Last, she wanted readily accessible resources to support 5–14, for staff. There was still a lot of sharing; so far the school had only one floor turtle between 15 classes, but in practice all the children should be able to work with them. In addition, she hoped that the staff would be able to access more schemes – she would like to think they could dip into a variety of mathematics schemes, for example, rather than just one, and would like to change the reading scheme. Teachers, she stressed, could not do without resources.

If progress in implementing 5–14 is thought of as a linear activity involving a relatively smooth dealing with one guideline followed by another, this interview with Mrs Lowther suggests that Glenmount had made little progress in the school year 1993/4. However, if she had been successful in getting the teachers to question their existing practice, think in a fresh way about the kind of teaching methods they could use in their classrooms, use different approaches, and realise that the process of assessment was more complex than simply summative teacher assessment, surely that was progress too. Were the teachers themselves aware of any such progress?

The teachers' views of progress

I had asked Mrs Lowther to estimate the extent of school progress with the guidelines using a four-item scale, and asked the teachers to do the same but with relation to their own personal progress. As Mrs Lowther had felt, the English language and mathematics guidelines were those in which teachers felt furthest along. Three of the five teachers interviewed this year placed themselves as 'well under way' in language and two in mathematics, with the other teachers thinking of themselves as 'at the start of formal implementation' in both areas. The idea of feeling confident featured in all the comments from those teachers who felt they were well under way; for example, the P1 teacher said she felt 'far more secure'. For the P4 teacher, forward planning played a major role in creating that feeling of security. 'Since the new headteacher has been here we've begun to plan, our term plans, topic plans and so on, in such a way that we've had to implement the 5–14 guidelines,' she said. 'So we've now reached a stage where I think we're far more familiar with the strands, and we're trying to incorporate that into our topics.'

The P6 teacher, who was a probationer, thought that 5–14 might be easier for her than other teachers. 'I personally work with 5–14 because I don't know any different,' she told me. 'It's easier for me as that's what I came through college with, so that's all I know.'

The teachers who did not feel advanced enough to place themselves in the 'well under way' category had different reasons for holding back. The P3 teacher thought that until she was assessing children's progress in each of the curricular areas using 5–14 principles she could not regard herself as well under way, but she lacked the confidence to 'forge ahead' on her own and was waiting for the whole-school to turn to assessment issues. With respect to mathematics, the P1 teacher was still aware of gaps between SPMG (which the school used) and 5–14, and felt that these held her back somewhat. However, she told me that like all the staff, she used the 5–14 guidelines in her planning, and thought about it a lot.

With regard to implementing the religious and moral education guidelines, two teachers had 'not begun' but three placed themselves at the stage of 'awareness-raising and discussion'. They had read the document carefully on their own initiative and had been using it in forward planning. One of the three explained that she had a particular difficulty with these guidelines because, herself a Roman Catholic, she was not sure what the 'no go' areas were for non-denominational teaching, and looked forward to the time when a school policy would be created. In implementing the expressive arts guidelines, three teachers judged themselves to be at the start of formal implementation even though there had been no whole-school initiative. Two of these attributed this progress, at least in part, to the input from visiting specialists, who were a big help because they gave teachers a plan of work to follow. The P4 teacher traced her confidence to having done a drama course at Moray House College. The other two teachers regarded themselves, respectively, as being at the stage of awareness raising and having not made a start on the expressive arts guidelines.

Asked to comment on the environmental studies guidelines, three of the five teachers could see ways in which they would be helpful, especially in enabling teachers to see the spectrum of what had to be taught over the entire year. However, one added that teachers would need a lot of help with them. The P6 teacher, the probationer, was particularly enthusiastic, telling me she enjoyed using the environmental studies guidelines, and how much she liked the way the strands were set out. She added, however, that she found it hard to visualise environmental studies as a whole and was unable to plan for more than one topic at a time. The other two teachers were not sure if these guidelines would help or not. One thought them hard to come to terms with, being so different from the others, and the other was concerned that they contained too much. All five teachers said they used the headteacher's pro-formae for forward planning, but none had made changes yet in the way they taught the environmental studies subjects.

With respect to assessment, all the teachers interviewed said they had read the guidelines, although nobody had used them yet. All were waiting for whole-school action before engaging with them on a personal level. Opinions about them varied; the P3 teacher, for example, thought them good because peer review and self-assessment were worthwhile activities, while the P6 teacher considered the guidelines helpful if only because there was nothing else. On the other hand, the P4 teacher was disappointed that they gave no examples of what teachers should do:

> *I wouldn't say I find them particularly helpful. It doesn't offer examples of how you can assess – I think that's what most teachers are looking for. It tells you what you should be assessing but not particularly how you should be assessing and recording it.*

There was, however, an indication that the teachers felt more familiar than in the past with at least one aspect of 5–14 assessment, namely their ability to judge the pupils' progress according to 5–14 levels. Four of the five teachers interviewed this year felt fairly sure that they could now judge what 5–14 level a child had reached. Such confidence, the P1 teacher told me, came with using the documents, while the P4 teacher claimed that having recently taught different year groups had helped her. She realised that levels weren't tied to year groups but thought that teachers who only had experience of teaching one year stage might only have worked with a limited range. 'What I'm trying to say is,' she explained,

> *I've heard it said 'You're Primary 3, they'll be Level whatever' and that's not necessarily the case, as it says in the guidelines. But I think you can become familiar, especially if you teach a stage for any length of time, with the level or levels that you've been teaching to, and not necessarily the others. Maybe a Primary 7 teacher is aware they could have level A to level D in their class, but I would question whether they were familiar with, for instance, level A.*

The P2 teacher's view lent weight to this opinion. Unlike the other teachers, she did not feel able to recognise work at the 5–14 levels because she had no experience of it. She had always taught P2 classes, and the children she had taught had always been pre-level A.

What had helped the teachers to implement 5–14?

Practice in writing forward plans with reference to the guidelines emerged as the factor most commonly thought to be helpful, because it led to greater familiarity with the 5–14 Development Programme. Because of this, three of the teachers interviewed this year felt that working with 5–14 was easier than it had been twelve months earlier. In the cases of mathematics and English language, the P2 teacher pointed out, this process had been complemented by the whole school's having made time to look at the guidelines, and the

whole staff having been pulled into the process of making up policies. The P3 teacher, however, did not really think that implementing 5–14 was any easier for her this year than it had been before; she hoped for more help from the Region. The fifth teacher, the probationer, had no previous experience with which to make comparison, and in fact she had never found it hard to implement 5–14. Nevertheless she stressed how helpful she had found it to be in a school where senior staff were very supportive. She thought that to some extent progress was dependent on someone pushing teachers. 'There's a lot of schools who don't necessarily do their planning by the 5–14,' she told me, 'but if you're not pushed to do it, you won't.'

Interestingly, although the P4 teacher echoed Mrs Lowther's concern about the school's now dated resources, none of the teachers was able to identify anything that had specifically held them back.

Hopes for the future

Asked to look forward and identify what they wanted to have achieved with respect to 5–14 in three years' time, all those teachers who responded hoped to be more familiar with the guidelines, so that they could plan without the constant need to consult them. In addition, the P6 teacher stressed her desire to feel comfortable with the mechanics of assessment – to know what formats worked and which criteria were important, to be able to draw on examples of work at level C, to have access to examples of suitable charts and ticksheets. To help her reach these goals she felt the need for more in-service time. The P2 teacher looked forward to the whole school's tackling other 5–14 areas more generally, while the P4 teacher identified a new mathematics scheme as something that would help her.

■ Reflections

I left Glenmount at the end of the third week of interviews feeling that although in some respects the school might feel it had a long way to go, confidence levels among the staff were rising, progress in implementing 5–14 was being made and was likely to continue. Looking over my notes from the first year and trying to remember how things had been, I felt that now, many of the teachers were taking a longer and more critical look at their own practice.

Recalling the early interviews I was struck by the contrast between the two headteachers in the way they looked at the 5–14 Development Programme. While Mrs Rae had thought little change would be needed, Mrs Lowther had seen so great a need for change that implementation of 5–14 would have to begin at the most basic level. Mrs Rae had seemed unaware either that some of her teachers wanted to tackle 5–14, or that they wanted help from her. Mrs Lowther was very mindful of how much help and support her staff were going to need from her, and had clear ideas of how to go about giving it. Which of the two took the more realistic stance is perhaps illustrated in the expressions of relief coming from the staff once Mrs Lowther had begun to tackle implementation on a whole-school level, and in their own increasing feelings of security.

It seemed to me that another notable feature of Mrs Lowther's handling of 5–14 implementation was her keen awareness of staff development needs. She identified a need for the teachers to move away from schemes, understood that they were not used to sharing classrooms with other teachers, knew that the staff were uneasy about teaching unfamiliar subjects such as information technology and some aspects of science, and

understood that they were not ready to draw up a meaningful assessment policy. Her response to such needs had been to show the teachers in their own classrooms how things could be done. She and her depute had shown, for example, how mathematics could be taught through mini-topics as well as through schemes, and had demonstrated that collaborative teaching could be fun. Mrs Lowther had drafted forward planning sheets for environmental studies, but had recognised that the teachers needed to absorb new ideas gradually and had left it up to staff whether or not to use them; as the last interviews with the teachers suggested, almost all had chosen to do so. Such a close understanding of staff needs had undoubtedly come largely from her having worked with the teachers in their classrooms, but, observing the interactions between Mrs Lowther and the staff at break times, I felt that because the headteacher had gone out of her way to get to know the teachers on a personal level, it had also come about because they had come to think of her as a friend and would not find it hard to tell her about the areas in which they lacked confidence.

Although few of the teachers I interviewed in the second or third years had commented on the helpfulness of any of Mrs Lowther's individual strategies, the most striking aspect of the teacher data from the second year was the openly expressed belief that they had been held back from implementing 5–14 by the previous headteacher's inactivity. Ironically, it seemed from my perspective that in attempting to protect the staff from pressure by denying the need for change Mrs Rae had unwittingly increased their uncertainty and worry; the relief several expressed at feeling a sense of direction was plain. The fact that Mrs Lowther required staff to use the 5–14 guidelines when drawing up forward plans had led most of the teachers to feel more secure and familiar with the Development Programme, and they had appreciated the opportunity to familiarise themselves with the guidelines as part of a whole-school initiative.

Necessarily, to some extent these reflections are subjective, coloured as they have been by my own experience of being a visitor to Glenmount over three years which, for the staff, were years of challenge and change. So it is not perhaps inappropriate for my last comment also to be subjective. In the first year of being in the school I recall breaks in which my attempts to converse with staff were met with lukewarm responses. In the last year I recall breaks during which birthday cakes were shared and I was firmly drawn into conversations. It is likely that much of the difference was due simply to my no longer being a stranger and the research no longer threatening. However, I believe that some of the difference stemmed from a greater overall confidence and lessened tension among the staff. The school seemed a warmer place as a result, and I was truly sorry I would not be returning the next year to find out how the next chapter of the 5–14 story would turn out.

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